Ultra Recall

User's Manual

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1 Introduction

1.1 Overview

Where Did I Put That?

Anyone who uses a computer on a regular basis has asked that question many times. Ultra Recall helps you quickly answer that question every time you ask it.

Ultra Recall is a personal information management (PIM) / knowledge management (KM) application for Microsoft Windows. It helps you capture, organize, and recall all of your electronic information across all the applications that you use.

There are lots of PIMs on the market, but they tend to be either too simplistic to be very useful, or too complicated to figure out. Ultra Recall was designed with the goal of providing ease of use along with enough power to be able to handle all of your information management needs.

Using your computer to manage your information shouldn't require a degree in computer science. You should be able to store ALL your information quickly and intuitively, back it up simply and reliably, recall this information efficiently and consistently on demand, all from one program. With Ultra Recall, all of these requirements are met in an application simple enough for a computer novice yet having the capabilities to satisfy even an advanced user.

Click here for more reasons to use Ultra Recall to manage your data.

1.2 Why Ultra Recall?

Save Time and Money

Using Ultra Recall as *the* place for your data will pay big dividends because you're data is always available, is stored in a logical, relational way, and can easily be backed up or even relocated with ease.

Stop Losing Information

Because Ultra Recall can manage *all* your data, regardless of its source, you don't have to wonder where your data is, or how to retrieve it. Store your data in Ultra Recall with the confidence that when you need, you'll recall it on demand.

Consolidate Your Data

The typical computer user has important data in many locations, in a variety of formats. Ultra Recall eases this daunting data management task with its comprehensive file and data format support, advanced organization capabilities, and high-performance and unsurpassed dependability. Instead of maintaining parallel sets of information segregated by their type or source, link them all together logically regardless of what they are in Ultra Recall.

Solve the Needle-in-a-Haystack Syndrome

Many of us fall prey to the overflowing Inbox, the ever expanding My Documents folder, or an overwhelming Favorites/Bookmarks list because these methods of data organization are simply too limited, too confusing, or too inconvenient. Even the most dedicated organizers are frustrated by spending significant time storing their information, then struggling to retrieve it when it is needed. Leverage the advanced searching capabilities of Ultra Recall and experience the unexpected: data on demand!

Backup your data (and know it can be recovered!)

We all know we should back up our data, but many of us either don't have the time or knowledge to successfully implement a backup strategy that ensures what is important will actually be protected. By placing your data and files in Ultra Recall, you can safely back up these individual Ultra Recall .urd files with complete confidence that in the event of computer failure, your data is safe.

Secure your Sensitive Information

Have information that you want to ensure stays private? Is Windows-based file/folder encryption either 1) not available, 2) too confusing, or 3) to difficult to manage? Ultra Recall is your solution! With its optional integral 256-bit RC4 encryption at your fingertips, you can secure your information with ease knowing it is safe and available with a single password.

Organize Your Information the Way _You_ Think

Have you tried other PIM applications only to be let down by being forced to layout your data in a way that is confusing or counter to your style? Given up trying to find a tool that makes sense to you? Ultra Recall provides unprecedented flexibility. Dump your data into Ultra Recall and use the extensive search capabilities to recall it, or organize as much as you like using templates, attributes, and logical linking. Give Ultra Recall a try and you'll find that instead of forcing you to change, it can adapt to you!

Have Fun!

Ultra Recall is the fun, flexible way to organizational success. Give it a try today.

Click here for as detailed description of Ultra Recall.

1.3   What is Ultra Recall?

Ultra Recall is _Data Capture_: Today's computer user accesses and utilizes many types of files and information but is forced to manage this interrelated data with multiple tools and applications. Email, web pages, text documents, images, shortcuts, PDF files, snippets of text, concepts, tasks and contacts are some examples of the information a typical user needs to use, store and recall. Ultra Recall organizes this chaos by capturing and managing _all_ forms of computerized information in a single application.

Using today's different applications to organize and store this diverse information, based on its type or source, is cumbersome and awkward. Remembering where everything is stored, and what other pieces of information are logically related is difficult and unreliable because you can't define relationships between different applications. In fact, defining relationships _within_ today's applications is frustrating because you are limited to a single link between different pieces of information, which is an unreasonable restriction.

Ultra Recall solves the dilemma in a simple, yet powerful way. Continue to use the different applications you have and understand to process the day to day tasks on your computer. But for information that has lasting value, simply move it into an Ultra Recall Info Database, regardless of the source. Each additional entry is automatically enhanced by the Ultra Recall program by identifying searchable words, assigning useful Attributes, and providing ways to annotate the data. In addition you can relate each new piece of information to any or all existing information in an intuitive manner.

Ultra Recall is _Data Storage_: Anyone who has used a computer for very long has collected a significant amount of information, typically stored haphazardly in many ways and places on your computer. From browser favorites, old emails and contacts, local files and documents, and more, this information is difficult to manage, backup, secure, then later migrate to your next PC. The latest versions of Windows address a few of these issues, but simply do not provide a cohesive way to

properly manage all your data.

While a wide range of third party tools are available to address some of specific problems listed, Ultra Recall provides the first complete solution to the overall problem of Data Storage. As described in the Data Capture section, Ultra Recall provides unheralded data management capabilities. Fortunately, Ultra Recall also provides unprecedented capabilities to efficiently store information this same information in a structured and understandable manner.

Ultra Recall stores your related information in a single file which provides high performance, storage efficiency through automatic compression, and rock solid reliability. With your information organized within individual Ultra Recall Info Databases, backup, restore, and migration efforts become trivial tasks instead of the frustration you have experienced in the past. Encryption is provided to dependably secure your sensitive information. All of these capabilities provide a comprehensive Data Storage package for anyone.

Ultra Recall is _**Data Recall**_: Everyone has experienced the frustration of knowing we saved some information somewhere on our computer, but not being able to find it when it is needed. While computers today have enormous computing power and amazing abilities, so often this capability is too difficult to use when it comes to managing the vast amount of information we collect over time.

Many of the application we use today provide some form of search capability. Microsoft Windows even provides search (or find) capabilities. Unfortunately, the search capabilities we are accustomed to are inadequate and typically unable to meet the challenge in the real world. In addition, due to the limitations above, they are only able to search a subset of our information, requiring us to master several tools that so often fail the challenge of recalling our information on demand.

Ultra Recall changes this by combining a powerful and intuitive search engine with the organizational and storage capabilities described above. A Quick Search is provided which typically locates your information in seconds, but can easily be refined as an Advanced Search, allowing you to tighten your search criteria to pinpoint the exact data you need. The search engine is very high-performance, the interface is user-friendly, and you can save the searches you define for future use.

Ultra Recall is _**Data Confidence**_: By managing your information in one location, and having extensive search capabilities, you now have a comprehensive system enabling you to store your data with confidence. Confidence that you can store the information in an intuitive and common sense way, confidence that you can backup and migrate the data when necessary, and confidence that you can find the information back when you need it. Ultra Recall will help you use your computer to its fullest potential!

Click here to see who can use Ultra Recall.

1.4   Who is Ultra Recall for?

Ultra Recall is for anyone that saves information on their computer for future use or reference. This encompasses a wide range, from light computer users that send and receive email and browse web pages, to a doctorate student researching a topic, compiling large amounts of related information and anything in between.

Here are some usage examples to consider:

**Internet User****:** Because Ultra Recall is so easy to use, even intermediate computer users will benefit from the capabilities of Ultra Recall. Ultra Recall will help any user store their documents, contacts, emails, web pages (including the actual page content if desired), in a single location that is easily searched, backed up and migrated when a new computer is purchased.

**Mobile professional****:** Often professionals on the road use both a desktop and a laptop, making data management a difficult and confusing chore. Ultra Recall can simplify the process by providing a single place to store all the information needed on either workstation. By having all this data in a single

file, several options exist to ensure the information is always up to date on each machine.

Students and educators: Students, teachers, professors, and others in the educational field must constantly juggle large quantities of information, such as events, contacts, research, etc. Ultra Recall provides an ideal central location for managing and organizing all these disparate activities and data.

Legal Researcher: As a lawyer or paralegal researches a case, a wide variety of highly dependent information is encountered. People, concepts, emails, web pages, documents, images, faxes, and much more may be linked together in a web of evidence. Storing this information in a relational way, then sifting through the data is a challenging task. Ultra Recall's unique ability to faithfully represent multiple links between pieces of information, annotating each node of data, then viewing and analyzing these relationships are perfect for this usage.

Software Developer: Few industries experience a faster growing amount of technology and information than software development. Just keeping up with the pace of change is a difficult job. So often a concept, code snippet, web site or product is found that might prove useful in the future. Ultra Recall is the perfect companion for this task. As you add this random, yet potentially useful information, it is indexed with keywords, attributes, and notes that will ensure you can find it back someday when you need it.

Product Evaluator: As a person evaluates different products, comparisons of a variety of features, capabilities and price must be accomplished. This is often difficult because of significant variations in the various products being considered. By creating specific Attributes to document the different characteristics of each product, you can easily sort, filter and evaluate the competing products from many angles and perspectives.

Click here for a list of key features in Ultra Recall.

1.5 Key Features

Web Page and Document Capture
Easily capture any content from the internet or the local file system, including web pages, Microsoft Office documents, email messages, newsgroup posts, images, text, and more. In addition to storing the original document location, the page's icon and the full content of the document can be permanently stored so that no information will be lost even if the page disappears from the internet.

Keep Everything in One Place
Any web page, document, image, note, or text can be added to Ultra Recall and then easily organized, edited, annotated, and recalled when needed.

Easy Navigation
A host of capabilities are provided to quickly navigate your data: a complete forward/back history of recently viewed items, favorites for defining and accessing frequently used items, auto-completion and history for input fields, searching on popular or recently used items, and more.

Undo/Redo
As information is added and modified in Ultra Recall, unlimited undo and redo is available for all changes that are made.

Automatic Management of Metadata
Attributes about each piece of information such as the creation date, last access date, access count, source URL, etc., are automatically managed by Ultra Recall.

Reminders / Alarms / Recurrences
Any piece of information can be configured like an appointment with a reminder which can also optionally recur on a schedule that you define.

Item Flags and Tags
When adding important files, web pages, contacts, projects, tasks, notes, and more, they can be flagged with a variety of colors or tagged with keywords, marking them for any purpose and facilitating instant recall.

Advanced Search Capabilities
Extensive search capabilities are provided in Ultra Recall, including search highlighting and advanced search capabilities.

Linking
Logical linking allows items to be organized in multiple locations in the tree. Internal linking provides for creating links to items within the text of another item. And hyperlinks can can be used to link to external web pages and documents.

Hoisting
Hoisting allows one particular branch of your data to be viewed, allowing you to focus on individual sections of your database without distraction.

Import/Export Capabilities
Comprehensive import and export capabilities are available, which facilitate migrating data from many applications and exporting your data for reporting purposes, external analysis, or to import into an alternative or complementary application.

Extensive Keyboard Accessibility
Keyboard shortcuts are provided for nearly all commands, and all functionality is accessible via the keyboard or mouse.

Encryption
Secure everything stored in an Ultra Recall Info Database with a single password.

Click here to get started with Ultra Recall.

1.6 New Features

1.6.1 Version 2

- Run from USB stick

- Open multiple items in tabs

- Open multiple databases in tabs

- Favorites toolbar

- Folder synchronization

- Rename items to selected text or current date

- Link/move/copy dialog

- Jump/navigate to item dialog

- Option to manually sort new items by default

- Lock searches from modifications

- Additional custom window layouts

- Calendar in docking pane

- Remember open databases between sessions

- GTD sample

Note: See the [history page](#) on the web site for full details.

1.6.2 Version 3

- Microsoft Windows Vista compatibility

- Microsoft Office 2007 compatibility

- Improved multi-user support

- Internal web page editing

- Info item attribute type

- Two-way Microsoft Outlook/cell phone synchronization

- Two-way folder synchronization

- Custom forms for data entry

- Enhanced rich text editing

- Simplified tagging (categorizing)

- Nested searches

- Search on item relationships

- Optimized phrase search

- Support OR expressions in Quick Search

- Preserve tab state between sessions

- Mozilla Firefox and Thunderbird integration

- Hoisting

- User-defined formatting of item title.

- Customize pane fonts

- Option to display one Windows taskbar entry for multiple databases

· Open new tab by clicking small blank tab

· Option to search only user-defined keywords (tags)

· Prompt for location when importing from other applications

· Support customization of context (right-click) menus

· Editing of item text on Contact form

· Create custom form for contacts

· Search combo on view toolbar

· Web import optimizations: Use cached version of files if available and up-to-date; add option to always used cached version if available

· Print/preview/RTF export of contact/form fields plus item detail text

· Drag items as documents to Explorer and other applications.

· Internal (wiki) linking

· Insert named hyperlinks into text items

· Import/export sets

· Insert child/sibling tear-off toolbars

· Support URL links to UR items from other applications

· Command-line export and synchronize

· Add Office 2007 theme

· Native support for import of Outlook notes

· Retain vertical position after move left in tree if siblings are manually sorted

· Add Lineage to Reminder dialog and Item Parents pane

· More samples

Note: See the history page on the web site for full details.

1.6.3 **Version 4**

· Microsoft Windows 7 compatibility.

· Microsoft Office 2010 (32-bit edition) compatibility.

· Highlight search matches.

· Step through search matches (Go menu).

- Full-text search enhancements.

- HTML export.

- Sorting in the Data Explorer pane detects and sorts by dates and numeric values.

- Syntax coloring text editor for source code files.

- Filter advanced search with additional quick search text.

- Internal link anchors.

- Additional tree hoisting options.

- Collapse Tree command to collapse entire tree.

- Postbox compatibility.

- Tab enhancements (*Lock tab title* and *Go to locked item*).

- Support drag/drop and copy/paste from UR into applications accepting URLs.

- Set tab stops and indent size in rich text and text document editor (*Format | Tabs* on menu).

- Delete logical links from Item Parents pane.

- Paste Multiple Lines command: *Edit | Paste Special | Paste Text One Item Per Line* in Data Explorer pane creates one item per line of text on clipboard.

- Import delimited data from clipboard.

- Option to automatically import clipboard content.

- If *Tools | Options | Import | Choose location when importing or pasting from other applications* is checked, show import dialog without showing main UR window.

- Toggle display of forms (*View | Other Windows | Show Forms* on menu).

- Ability to set boldness and italics of custom fonts.

- Delete Line command: *Edit | Cut* or Ctrl+X in rich text editor with no selection deletes (cuts) current line.

- Double-click (or pressing Enter) on an item in Data Explorer pane without children opens document (equivalent to *Item | Open Document* on menu).

- Don't update Related Items pane scroll position while loading pane or if user scrolls, selects, or cancels while loading pane.

- Maintain position in Related Items pane after deleting item(s).

- Option to make selection more obvious.

- Copy Form command (*Edit | Copy Form*) separates form values with tab instead of space and

includes empty values.

- Update item Date Accessed attribute when skipping duplicate URL during import.

- Enable renaming of system attributes.

- More...

Note: See the history page on the web site for full details.

1.6.4   Version 5

- Windows 8, 8.1, 10 and Server 2012 compatibility.

- Command to show or hide completed items.

- Ability to lock items to prevent editing (extends search lock feature to all items and also prevents editing of item attributes).

- Option to select multiple attribute values.

- Option to collapse trees when opening database.

- Option to select last imported item after importing.

- Option for whether to show leaf items in tree.

- Option to show expandable indicator in Related Items pane to indicate items with children.

- Command to create manual keyword for the selected text (*Item | Keyword Selected Text* on the menu).

- Commands to change rich text editor or web browser zoom level (*View | Zoom* on the menu).

- Option to display full path of database file.

- Option to choose which favorites to show in Favorites toolbar.

- Command to search for selected text.

- Command to disable/enable word wrap in rich text editor.

- Command-line flag to open database in read-only mode.

- Support unchecking *Match whole words* search option with full-text search enabled (alternative to **word**).

- Support additional operators when searching on *Keywords (user-defined)* attribute in Advanced search.

- Improved parsing of imported and linked files in style sheets when importing web pages.

- Send IE9 user-agent string instead of IE7 when importing web pages.

- Handle internal link between databases in same folder if link path not found (both databases were

moved).

· Support pasting or drag/drop of bitmap on clipboard into Data Explorer pane to create image document.

· Support pasting or drag/drop of file as image from Windows Explorer or other file manager into text editor.

· Format | Highlight command toggles highlighting.

· Double-clicking tab on Item Details pane closes tab.

· Increase maximum number of favorites (50 -> 200) and databases (25 -> 100) shown in toolbars and menus.

Note: See the history page on the web site for full details.

1.7 License Agreement

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1.8   Installation

System Requirements

- Ultra Recall runs on Microsoft Windows 2000, XP, Vista, 7, 8, 8.1, 10, and Server 2003 thru 2012 R2 (32- and 64-bit editions).
- About 20 MB free disk space.
- 256-color and 800 x 600 resolution display settings (Recommended: 16-bit color and 1024 x 768 resolution or greater).

Installation Procedure

1. Run the setup application (`UltraRecallEval.exe/UltraRecallProEval.exe`).
2. Follow the instructions on the installation dialogs. Please note that the software can only be installed for the number of computers or users it has been licensed for. Visit the [Kinook Software web site](#) for more information.
3. The *Install rich edit control with table support* option will install a version of the rich edit control that supports tables. Newer versions of `riched20.dll` provide better display of advanced RTF features such as tables and other formatting, but could also contain bugs not found in older versions. If you check a rich edit option during installation but later wish to revert to the system version, delete `riched20.dll` from the Ultra Recall installation path (typically `C:\Program Files\UltraRecall`) or uninstall Ultra Recall and reinstall with the *rich edit* options unchecked.
4. Checking the Internet Explorer/Explorer, Firefox/Thunderbird/Postbox, and Outlook options will install additional integration with those applications.
5. Once Ultra Recall has been successfully installed, you will find new start menu icons for Ultra Recall. Entries for the application, help, and samples will be available.

Portable Installation

Ultra Recall (Professional edition only) can also be installed and run from a USB stick or other removable device. To install Ultra Recall on a portable device, download the UR Portable ZIP file and extract its contents (preserving folders) to a folder on the portable device (i.e., `\UltraRecall`). To run Ultra Recall from the portable device, simply double-click `UltraRecall.exe` in the folder the ZIP file was extracted to. When run from a removable device, all options, registration, and customizations will be stored and read to/from INI files in the same path as `UltraRecall.exe`.

Note: To force Ultra Recall to run in portable mode (for instance, when run from a regular hard drive or a USB hard drive that isn't identified as removable), create an empty text file named `UltraRecall.ini` in the same path as `UltraRecall.exe` and restart Ultra Recall.

Note: The main installer performs several tasks which are not performed when running the portable version, including:
- Creation of Windows Start menu shortcuts
- Associating .urd files with Ultra Recall
- Configuring Windows to start Ultra Recall during logon
- Registering the *ur* URL protocol (required for correct operation of internal links)
- Installing newer versions of the rich edit control
- Installing Internet Explorer/Explorer, Firefox/Thunderbird/Postbox, and Outlook toolbars/extensions
- Installing sample databases

2   Getting Started

Welcome to Ultra Recall. Get ready to organize your information in the way that makes sense to you! This section will help you understand what Ultra Recall is, how it works, and how to make it work for you.

These starter topics will get you on your way towards a level of data management you've only dreamed of before now:
- Basic Concepts
- Creating a Database
- Creating an Info Item
- Samples
- Using Ultra Recall

- Application Components

2.1   Basic Concepts

Ultra Recall manages your information (anything that can be stored on your computer) by storing it in an Info Database.

An Ultra Recall Info Database is simply a collection of information, organized in an intuitive way, all stored within a single file. You can think of an Info Database as your *My Documents* folder, your browser bookmarks, your email application folders, and Windows Explorer combined in one place, but with many additional features available.

In an Ultra Recall Info Database, each complete piece of information is referred to as an Info Item. An Info Item could be a web page, an email, a file or document, a section of text, an image, etc. Basically any form of information that can be entered or stored on a computer qualifies.

Each Info Item has several related Attributes. Each Attribute is a specific characteristic of the Info Item , such as the *Date* the Info Item was created, the *URL* of a web page, the *First Name* of a *Contact*, etc.

When an Info Item is created or modified, any text of the Info Item and all appropriate Attributes are examined by the Ultra Recall application and stored with the Info Item, facilitating later recall and retrieval of the Info Item when you need it.

Each Info Item is based on a Template Item. This Template Item Attribute defines the *type* the Info Item is.

Info Items, Attributes, Keywords, and Template Items are the basic components used to store information in Ultra Recall.

Logical Linking is the technology that Ultra Recall uses to connect your information together in a logical and unlimited manner.

2.1.1   Info Database

Ultra Recall stores the information it manages in files called **Info Databases**. These files have a .urd extension, and use a compressed, binary format, that can optionally be encrypted using a password supplied by the user.

Each **Info Database** is a single file that can be located anywhere on your computer. The default location is your *My Documents* directory, but another possibility is to place your **Info Databases** in a separate folder (such as *C:\UltraRecall*).

You can store all your information in a single **Info Database**, or use many (unlimited) **Info Databases**.

See Also:
- File Format

2.1.1.1   File Format

The open source SQlite database engine is used by Ultra Recall, with some modifications to support encryption and stored content storage. Each Info Database is a binary database file.

There are several advantages to using a binary database storage mechanism, including:
- **Instant load time:** Ultra Recall starts nearly instantaneously even with very large (2+ GB) Info Databases.
- **Performance:** Using a true database engine, the time required to add, modify or even retrieve data remains constant as database grows. Storing to a flat text or XML file causes save time to increase with the size of the file.

- **Indexed searches:** Since .urd files are actually binary database files, they can be indexed in multiple ways, in some cases increasing the performance of searches by a factor of a 100 or more.
- **Smaller files:** Most human-readable formats such as XML are not very space efficient, with repetitive text consuming significant amounts of space and little opportunity for compression. An Ultra Recall database file is highly efficient in size, and all stored binary data stored is compressed. The net result is that quite often, less space is consumed for documents stored in Ultra Recall (including meta data and indices) than the original files on disk.
- **Data consistency:** Due to the additional information stored (attributes, text, logical links, etc.) for every item of data added to Ultra Recall, multiple database changes are required for most operations. Using a database with atomic commits ensures that all or none of the changes in a overall update are done; other file formats do not provide for this capability.

The only disadvantage is that .urd files can't be opened in other applications. To address this concern, several export capabilities are provided, including an xml export capability, which allows all data stored in an Info Database to be exported to a human-readable file format.

Note: Transactional processing is achieved through the use of journal files, which are hidden, temporary files created in the same path as each .urd file, which end in "-journal", during any change to the Info Database. These journal files exist only while an update is executing, but will remain if Ultra Recall is terminated during the update (due to a system crash, power failure, or other error condition).

It is imperative that these journal files are not deleted until the Info Database is reopened in Ultra Recall, so the journal file can be reversed (which is done automatically by the Ultra Recall application). Any 3rd-party "Temporary File Cleaner" application installed must not delete these files, or data corruption can occur (in the event of abnormal application termination).

Note 2: In addition, small cache files for each opened Info Database are created by Ultra Recall in the temporary path to optimize query performance. These temporary files (named "ultrarecall_***", where *** is a random string) are also automatically deleted by Ultra Recall at normal shutdown, but can remain in the event of abnormal application termination. They are locked while Ultra Recall has them in use, but can safely be deleted when not in use by Ultra Recall.

2.1.2   Info Item

An **Info Item** represents a single complete entity of information stored in Ultra Recall.

Examples of information that can be an **Info Item** in Ultra Recall:
- email message
- web page
- Microsoft Word document
- PDF file
- some formatted text (rich text)
- a task
- a project
- a recipe
- text file
- JPEG image
- a contact
- browser bookmark
- etc

Info Items can be linked together, and these relationships are maintained in the Data Explorer Pane. When an **Info Item** has other **Info Items** linked to it, these Info Items are referred to as Child Items. The **Info Item(s)** that an **Info Item** is linked to are referred to as Parent Items. When an **Info Item** is selected in the Data Explorer Pane, the related Child Items are displayed in the Related Items Pane (with a *Child Items* caption), and its Parent Items are displayed in the Item Parent Pane.

Each **Info Item** contains multiple Attributes, which are single characteristics of the **Info Item**. These Item Attributes are viewed and edited in the Item Attributes Pane.

Each **Info Item** has a unique ItemID System Attribute. Note: Some system attributes are not displayed by default (which are configured in the Attributes Options dialog).

Each **Info Item** can have Item Notes assigned, which allows you to annotate any **Info Item** with formatted text, without changing the primary information of them.

Each **Info Item** is based on a Template Item. The Template Item for each **Info Item** is displayed and edited via the Template Item Attribute in the Item Attributes Pane.

See Also:
- Attributes
- Data Explorer
- Keyword
- Template Item
- Item Attributes Pane
- Item Notes Pane
- Flags

2.1.3 Attribute

Each Info Item has specific characteristics which are recorded in Ultra Recall as one or more constituent **Attributes** (similar to database columns). An **Attribute** has a unique name plus a category, type and additional properties. An **Attribute** is defined once but can be assigned to many Info Items (but only once per Info Item).

Attributes for the selected item(s) can be created and modified using the Item Attributes Pane, viewed in the Related Items pane, and searched on using an Advanced Search.

Attributes are a convenient way to persist the different characteristics of Info Items in an organized, searchable way. **Attributes** can add structure to an Ultra Recall Info Database. **Attributes** can be searched for existence and for value, and can be used to sort the Info Items displayed in the Related Items Pane.

There are two different groups of **Attributes**:
- System Attributes: these are either maintained by the Ultra Recall application or are required for internal use.
- User Attributes: these can be created, modified and/or deleted by the user.

Each **Attribute** has several properties which are edited with the Attribute Editor. Each **Attribute** stores data of a particular Attribute Type. In the Item Attributes Pane, custom editors are provided for the different Attribute Types.

See Also:
- Info Item
- Attribute Type
- System Attributes
- User Attributes
- Flag
- Attribute Editor
- Item Attributes Pane
- Related Items Pane
- Attribute Options

2.1.3.1 Attribute Type

Each Attribute contains a particular type of information. Each type is a separate **Attribute Type**.

A different value editor is provided for the different **Attribute Types** in the Item Attributes Pane to make entry easier and more accurate.

The different **Attribute Types** are:
- Date
- Date+Time
- Info Item
- Form
- Money
- Number
- String
- Time
- Yes/No
- Data

Note: The String, Number and Money Attribute Types allow direct entry of the value, without a specialized value editor. For these Attribute Types, you are allowed to enter data that does not match the type (a good example is entering *56 bps* for a Number Attribute Type value). For Attributes using the Number and Money Attribute Types, Ultra Recall will use the leading numeric part of the value for search and sorting purposes.

2.1.3.1.1 Date

Attributes based on the **Date** Attribute Type store date information (without time included).

Below is the example of the **Date** editor (used in the Item Attributes Pane) provided to facilitate date value entry:
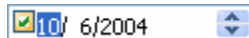
See Also:
- Calendar Pane
- Attribute Options

2.1.3.1.2 Date+Time

Attributes based on the **Date+Time** Attribute Type store date information (with time included).

Below is the example of the **Date+Time** editor (used in the Item Attributes Pane) provided to facilitate **Date+Time** value entry:
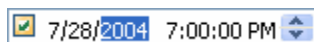
See Also:
- Calendar Pane

2.1.3.1.3 Form

Each Template has a Form attribute. If this attribute is has no value, the Item Details pane default viewer for that item type will be used. If a Form defined in the info database is assigned to a template item's Form attribute, that form will be displayed in the Form Viewer when an item based on that template is selected, providing another method for viewing and editing the item's attributes.

See Also:
- Forms
- Forms Dialog
- Item Details Pane
- Form Viewer

2.1.3.1.4 Info Item

Attributes based on the Info Item Attribute Type link that attribute to another Info Item in the database, providing another way to define the relationship of one item to another.

In the Item Attributes pane, double-click on an Info Item attribute (or right-click and choose *Edit*) to display a dialog for choosing the Info Item to link to. Right-click on the attribute and choose *Open Shortcut*, or select the attribute and choose *Item | Open Shortcut* on the menu to navigate to the Info Item.

On a form, with an Info Item attribute focused, choose *Edit | Rename* on the menu or press the related shortcut (default is F2) to display a dialog for choosing the Info Item to link to. Choose *Item | Open Shortcut* on the menu (default shortcut is Ctrl+Q) to navigate to the Info Item.

See Also:
- Logical Linking
- Internal Linking

2.1.3.1.5 Money

Attributes based on the **Money** Attribute Type store monetary information.

2.1.3.1.6 Number

Attributes based on the **Number** Attribute Type store numeric (integer or floating point) information.

2.1.3.1.7 String

Attributes based on the **String** Attribute Type store text information (anything you can type).

String Attributes can be keyworded, and can have a set of List Values assigned (which the value assigned can be restricted to).

2.1.3.1.8 Time

Attributes based on the **Time** Attribute Type store time information (without date included).

Below is the example of the **Time** editor (used in the Item Attributes Pane) provided to facilitate **Time** value entry:

See Also:
- Calendar Pane

2.1.3.1.9 Yes/No

Attributes based on the **Yes/No** Attribute Type store boolean information.

Below is the example of the **Yes/No** editor (used in the Item Attributes Pane) provided to facilitate date value entry:

Yes
Yes
No

2.1.3.1.10 Data

Attributes based on the **Data** Attribute Type store binary information. Several system Attributes are based on the **Data** Attribute Type, but you can't create additional Attributes of this Attribute Type.

The *URL* Attribute is a special Attribute based on the **Data** Attribute Type, because it also functions like a String Attribute, but for an Info Item based on the Document Template Group, also contains the actual document contents when the Store Contents option is checked. If the binary data stored for this Attribute can be modified, it can only be edited in the Item Details Pane (or externally if this option is enabled for the particular file type).

2.1.3.2 Properties

Each Attribute has several **properties** that along with the assigned Attribute Type, define what type of data will be stored, if and how the values will auto-complete during data entry, whether the entered value will be keyworded by Ultra Recall, and if entered values are constrained to a range or a set of values.

The Attributes Dialog is used to view or modify the **properties** of each attribute (only user attributes properties can be modified).

See Also:
- Attributes
- Attribute Types
- Attributes Dialog
- Item Attributes Pane
- Keywords

2.1.3.3 Category

Each Attribute has a **Category**, which is a string value used to group Attributes. This value is edited using the Attributes Editor.

Categories are used to group Attributes, primarily in the Item Attributes Pane.

See Also:
- Attribute
- Attribute Type
- Attribute Editor

2.1.3.4 System Attributes

System Attributes are those Attributes that are pre-defined in a new Info Database and can't be deleted or modified.

These **System Attributes** fall into one of following types:
- Auto Attributes
- Core Attributes
- Template Attributes
- Virtual Attributes

Note: Some **system attributes** are not displayed by default (which are configured with the Attributes Options dialog).

See Also:
- Attribute
- Attribute Type
- User Attributes
- Attributes Editor
- Item Attributes Pane
- Attributes Option Dialog

2.1.3.4.1 Auto Attributes

Auto Attributes contain values that are maintained automatically by the Ultra Recall application.

These **Auto Attributes** include:
- *Access Count:* Whenever the *Date Accessed* Attribute is updated, this Attribute is incremented.
- *Compressed Size:* the compressed size of stored documents.
- *Content-Type:* the reported content-type value of documents retrieved from the internet.
- *Date Accessed:* automatically updated when an Info Item is accessed.
- *Date Created:* populated with the exact date and time of each Info Item creation in Ultra Recall.
- *Date Deleted:* the date that an Info Item is deleted to the Recycle Bin.
- *Date Modified:* whenever an Info Item is modified by the user, this Attribute is automatically updated to remember the date of the last change.
- *DocType:* an internal number representing the type of document being stored.
- *Document Size:* The uncompressed size of stored documents.
- *Encoding:* the reported encoding of documents retrieved from the internet.
- *ItemID:* an internal identifier given to each Info Item (unique to the Info Database).
- *Keyword Count:* the number of keywords assigned to the associated Info Item.
- *Original Begin Date:* this attribute is automatically added to an Info Item when a dismissed Reminder first recurs to 'remember' the initial *Begin Date* attribute specified.
- *Original Parent:* the name of the Parent Info Item an Info Item in the Recycle Bin was originally parented to.
- *Parent Count:* the number of Info Items the associated Info Item is parented to (equal to 1 unless Logically Linked).
- *Pending Reminder:* this displays the actual time a future reminder will be displayed.
- *Sync Date:* Whenever a Document type of Info Item is Synchronized, this value is updated to remember the date.

See Also:
- System Attributes
- Attribute
- Attribute Type
- Reminder
- Synchronization
- Folder Synchronization

2.1.3.4.2 Core Attributes

Core Attributes are those Attributes that are assigned to one or more Core Templates.

These **Core Attributes** include:
- *Default Child Template:* The template item assigned to the Default Child Template attribute of a template item determines the type of Child Info Item created by default for the associated Info Item. When a new Info Item is created, it will use this template, unless a document/URL is

dropped to create a new Info Item and the assigned template is not based on the Document Core Template.

* *Flag:* the user can change this value, but the attribute itself can't be modified or deleted.
* *Icon:* the user can change this value, but the attribute itself can't be modified or deleted.
* *Item Title:* typically* used as the title of the Info Item (displayed in the primary selection panes of Ultra Recall), other attributes can be used also be used as the title.
* *Template Item:* this value reflects the template that an Info Item is based on. This value can be changed to any compatible template. A template is considered "compatible" if it is derived from the same Core Template as the existing *Template Item.*
* *URL:* this attribute determines the location of the linked/stored document for any Info Item based on a Document template.
* *Reminder:* this attribute determines if/when a reminder is displayed for the Info Item.
* *Begin Date:* this date attribute (combined with **Begin Time** when populated) determines when a Reminder is displayed.
* *Begin Time:* this time attribute (combined with Begin Date when populated or with today's date if not) determines when a Reminder is displayed.
* *Recurring:* the value specified with this attribute determined if and when the owning Info Item's **Begin Date**/**Begin Time** value is incremented (if an associated Reminder is dismissed).
* *Address:*
* *CC:*
* *City:*
* *Company:* used as the Contact *Item Title* if both *First Name* and *Last Name* values are not provided.
* *Country:*
* *State:*
* *Postal Code:*
* *Due Date:*
* *Email (Home):*
* *Email (Work):*
* *First Name:* used as part of the Contact *Item Title*.
* *From:*
* *Last Name:* used as part of the Contact *Item Title*.
* *Message Date:* the date of *Email* Document Info Items.
* *Phone (Fax):*
* *Phone (Home):*
* *Phone (Mobile):*
* *Phone (Work):*
* *State:*
* *To:*
* *Web Site:*

* The core Contact template does not use the **Item Title** attribute as it's title. *See Custom Item Titles for more information.*

See Also:
* System Attributes
* Attribute
* Attribute Type
* Reminders
* Synchronization
* Custom Item Titles

2.1.3.4.3 Template Attributes

Several System Attributes are only applicable to Template Info Items.

These **Template Attributes** include:
- *Item Count:* This read-only attribute displays the number of Info Items based on the associated template.
- *Primary Attribute:* This read-only attribute displays what will be what the primary data is for Info Items based on the associated template.
- *Template Name:* This attribute determines the *Item Title* of the associated template.
- *Title Expression:* This attribute determines the attribute(s) used for the *Item Title* of Info Items based on the associated template (as displayed in the Primary Selection panes). *Note:* See Custom Item Titles for more information on interpreting/assigning this expression value.

See Also:
- System Attributes
- Attribute
- Attribute Type
- Custom Item Titles

2.1.3.4.4 Virtual Attributes

Virtual System attributes are not actually stored in the Info Database, but are computed from other data when displayed or searched.

These **Virtual Attributes** include:
- *Has Children:* this yes/no value indicates whether the associated Info Item has Child Info Items or not.
- *Has Reminder:* this yes/no value indicates whether the associated Info Item has a *Pending Reminder*.
- *Indent Level:* this number value is the how many times the associated Info Item is indented from it's root Info Item.
- *Item Notes:* this string value is the plain text of the Item Notes of the associated Info Item.
- *Item Text:* this string value is the plain text of an item or document.
- *Keywords (user-defined)***:** this string value is a comma-separated list of the user-defined keywords assigned to the Info Item.
- *Lineage:* this string value is the parent lineage of each associated Info Item, starting at the root, with each parent name delimited with the / character.
- *Object Exists***:** this yes/no value indicates whether a linked or synced folder/file or Outlook item exists for an Info Item.
- *Parent Title:* this string value is the name of the Parent Info Item for each associated Info Item.
- *Relevance***:** counts the number of times searched words or phrases occur within a document.
- *Tree Order:* this number value is the order of the item in the Data Explorer/Search pane (NULL value if sorted alphabetically).

See Also:
- System Attributes
- Attribute
- Attribute Type
- Searches
- Phrase Searching
- Reminders
- User-defined Keywords

2.1.3.5   User Attributes

Any Attribute not marked as *System* is a **User Attribute** and can be modified or deleted (this includes every new Attribute added by the user).

See Also:
- Attribute
- Attribute Type
- Attribute Editor
- Item Attributes Pane
- Attributes Options

Note: Available in Professional edition only.

2.1.3.5.1 Creating/Editing/Deleting

Attributes can easily be **created**, **edited** or even **deleted** with the Attributes Editor.

The following are ways to display the Attributes Editor:
- *Tools | Attributes...* from the menu
- Hit the *Insert* key when the Item Attributes Pane has focus
- Hit *F4* when an Attribute is selected in the Item Attributes Pane

See Also:
- Attributes
- User Attributes
- Assigning Attributes
- Copying Attributes
- Item Attributes Pane

Note: Available in Professional edition only.

2.1.3.5.2 Copying

Attributes are defined and stored in Info Databases, which allows the user to maintain different Attributes in each Info Database.

It is straight-forward to **copy** Attributes from one Info Database to another if that is desired. The procedure is to simply copy an Info Item from one Info Database to another that has the desired Attributes assigned, the "cross-db" copy of the Info Item will ensure that any attributes missing in the destination Info Database are automatically **copied**.

See Also:
- User Attributes
- Attributes
- Copying/Moving between Info Databases

2.1.3.6   Assigning to Info Items

Attributes are created and managed using the Attributes Editor and are then assigned to Info Items as a way to store additional information about an Info Item in a searchable, structured way.

You assign Attributes by simply inserting a new row in the Item Attributes Pane (this can even be done when multiple Info Items are selected).

Procedure to assign a new Attribute to an existing Info Item:

- Switch focus to the Item Attributes Pane (click in this pane with the mouse or hit *Ctrl+4*)
- Hit the *Insert* keyboard key (or use *Edit | Insert* from the menu)
- Choose an existing Attribute name, or enter a new name (this will create a new attribute)
- Click on *OK*

Note: the same procedure is used to assign Attributes to Template Info Items. Any Attributes assigned to a Template will automatically be added to new Info Items created from that Template.

See Also:
- Attribute
- Attribute Type
- Category
- Creating User Attributes

2.1.4   Keywords

Keywords are relevant words that assigned to each Info Item.

There are two types of **Keywords**:
- Auto-Generated: These are automatically assigned by Ultra Recall when an Info Item is created.
- User-Defined: These are the **Keywords** manually assigned by the user in the Item Keywords Dialog to tag or categorize items.

Keywords are used by Searches to accurately and efficiently locate Info Items located in an Info Database.

The **Keywords** assigned to an Info Item can be viewed or edited using the Item Keywords Dialog.

See Also:
- Item Keywords Dialog
- Auto-generated
- User-Assigned
- Search
- Import Options Dialog

2.1.4.1   Auto-Generated Keywords

When Info Items are created for text, Outlook objects, or document types listed below, Ultra Recall parses the information for text or keywords automatically. This occurs regardless of whether a document or object is stored or linked in Ultra Recall. These automatically generated keywords are referred to as **Auto-Generated** keywords.

Keywords can be retrieved for the following file types:
- HTML (web pages)
- Internet Explorer Favorites
- MHT (web pages saved by Internet Explorer)
- Microsoft Office documents (including Word, Excel, and Powerpoint)
- Microsoft Outlook (messages + attachments for known document types, contacts, appointments, tasks or notes)
- Firefox/Netscape/Mozilla bookmarks
- Email messages (Mozilla Thunderbird, Postbox, Outlook Express, The Bat!, Windows Mail, and Windows Live Mail messages and news posts and any MIME file, including attachments for known document types)
- PDF
- Pictures and other documents with summary information

- RTF (rich text)
- Text (system code page, UTF-8 and UTF-16 encodings)
- XML (most encodings)
- ZIP (any supported file types found in the ZIP file)
- TIFF documents containing OCR text (Microsoft Office Document Imaging)

Notes:
- Keywording of Outlook items, PDF files, and ZIP files available in Professional edition only.
- Auto-generated keywords are displayed only if full-text search enhancements are disabled. If full-text search enhancements are enabled, this list will always be empty (document text will still be stored and searched, with additional capabilities).

Auto-generated Keywords can't be manually added (see User-Defined Keywords) but can be deleted (they are automatically replaced when the Info Item is Synchronized).

The following rules are used by Ultra Recall to retrieve **Auto-Generated** keywords:
- Only files whose extension (or the extension for its content type) is included in the File extensions to keyword user option are keyworded.
- Numbers are included only when the related user option is checked.
- Words found in the Keyword Exclusion List are excluded.
- Words two characters or longer (up to 15 characters in length; longer words are truncated) are included.
- Alphabet characters and **$ _ @** characters are included.
- **# - + % &** characters are included if not the beginning of a word.
- **.** and **:** characters are included if not at beginning or end of a word.
- The same character repeated more than 3 times contiguously is not keyworded.
- All other characters are excluded (for example, **! ` ~ ; , ' " < > ^ ( ) { } | / **).

See Also:
- Keywords
- Document Summary Attributes
- Item Keyword Dialog
- Search
- Options Dialog
- Import (more) Options Dialog

2.1.4.2   User-Defined Keywords

User-Defined Keywords are words that are manually assigned by the user via the Item Keywords Dialog. Items having one or more **user-defined keywords** can be quickly searched via the Item Keywords Dialog or by performing a keyword search.

If you add a Keyword to this list, it will not be replaced or removed when the Info Item is Synchronized.

The **user-defined keywords** assigned to an Info Item can also be viewed via the *User-defined Keywords* virtual attribute.

See Also:
- Keywords
- Search
- Item Keywords Dialog
- Synchronization
- Virtual Attributes

2.1.5   Template

Each Info Item is based on a **Template** Info Item, which is simply another Info Item parented to the system **Templates** Info Item with some additional Template-related Attributes assigned. The **Template** of each Info Item is accessible as an Attribute value and can be edited in the Item Attributes Pane (you can change the **Template Item** to any other **Template Item** in the same Template Group).
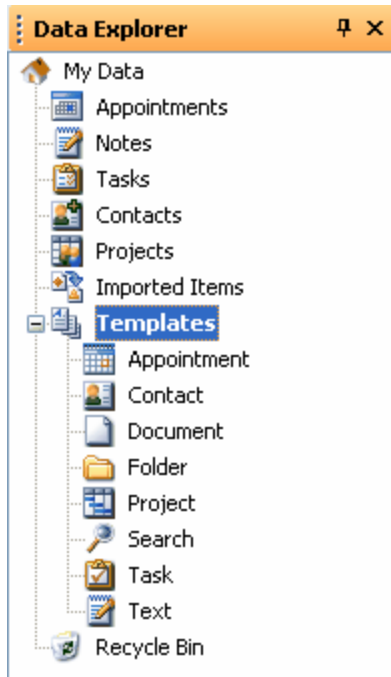
Templates define the default characteristics of Info Items. These defined characteristics include the Default Child Template item of child items created under items of this type, what Attribute(s) are used as the *Item Title*, what Attributes are assigned to an Info Item by default, and the default value for each assigned Attribute. In addition, the **Template** of each Info Item is also a searchable Attribute so it can be used as an additional method of organizing Info Items.

There are 2 fundamental types of **templates**:
· Core
· Derived

2.1.5.1   Core Templates

Core Templates are the fundamental Template Info Items that all other Templates are derived from. Each **Core Template** has a specific role in the Ultra Recall application.

There are four **Core Template** Info Items:

Template Name	Primary Attribute	Title Attribute	Role
· Text	Rich Text	Item Title	store formatted text
· Document	URL	Item Title	reference or store an external document or web page
· Contact	various Contact Attributes	Last Name, First Name	store a contact and related info
· Search	Filter Criteria	Item Title	store a defined Quick or Advanced Search

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See Also:
- Templates
- Derived Templates
- Template Group
- Searches

2.1.5.1.1 Text Template

The **Text Template** allows for creating Info Items containing formatted text.

When an Info Item based on the **Text** Template Group is created or selected, its rich text content is displayed in the Item Details Pane using the Rich Text Editor, where it can be viewed and/or edited.

The rich text for any Info Item based on the **Text** or derived templates can be edited externally with Open Document if *.rtf* is in the *File extension to open stored document writeable:* extension list on the Documents tab of the Options Dialog. This can be useful to use rtf features (such as tables, advanced indenting, etc) that are not supported by Ultra Recall's internal Rich Text Editor.

The other predefined Derived Templates are based on this template, and include:
- *Folder*
- *Project*
- *Task*

See Also:
- Core Templates
- Derived Templates
- Open Document
- Options Dialog
- Editing Microsoft Office and PDF Documents Internally
- Editing Documents Externally

2.1.5.1.2 Document Template

The **Document** Core Template is defines Info Items that reference any type of document. Any Info Item based on a Template in the **Document** Template Group has a *URL* Attribute which can be populated with the location of the referenced document.

There are many ways to create an Info Item based on the **Document template**:
- Drag & drop or copy and paste files or folders from Windows Explorer to the Data Explorer Pane
- The Explorer Send To menu
- Import web page content from Internet Explorer or Firefox
- The Import Wizard

The *URL* Attribute itself is edited in the Item Attributes Pane, and the content of the document itself is viewable/editable* in the Item Details Pane.

If the Store Contents button is depressed (and a valid value is provided in the *URL* Attribute), the actual contents of the related document are stored within the Ultra Recall Info Database.

* only editable if an appropriate editor is available for the displayed document.

See Also:
- Stored Document Templates
- Stored Contents

2.1.5.1.2.1 Store Contents

When an Info Item based on a Document Template Group is created or imported, you have the option of actually **storing the contents** of the document within the Ultra Recall Info Database.

Storing the actual document in your Info Database provides many advantages:
· Make remote documents available even when you are off-line
· Preserve a web page or other remote document even if it disappears, moves or changes
· Have one copy of the document that can easily be transported or multi-linked using Logical Linking
· Protect access to the document with an Encrypted Info Database
· Efficient storage of compressible documents due to Ultra Recall's automatic document compression

The **Stored Contents** button [image], placed by default in the Item Toolbar, will be depressed when a document Info Item has been stored. You can easily toggle the **Stored Contents** status of any Info Item based on a template from the Document Template Group by clicking this button.

Other indications that an Info Item contains a **stored** document:
1. *[Stored]* will be appended to the title displayed at the top of the Item Details Pane.
2. The existence of the Document Size attribute.

You can toggle the **Stored Contents** status of multiple Info Items by re-importing them the desired way when you use the Create logical linked items for duplicate URLs option. See Folder Synchronization, Import Files and Import a folder for details on re-importing.

Depending on the document type, the document can be configured for editing within Ultra Recall or opened externally in its associated application.

If an item's document is not **stored** in Ultra Recall, it is **linked** to the original file or web page. A linked item can be edited within Ultra Recall if *Allow internal editing of linked documents* option on the Document Options page is checked.

See Also:
· Editing Stored Documents Externally
· Synchronization
· Import Files
· Import folder
· Import (more) Options
· Document Options

2.1.5.1.3 Contact Template

The **Contact Template** is a specialized Template that uses a custom Item Details Pane Contact Editor to facilitate viewing and editing of **Contact** information.

See Also:
· Contact Editor
· Core Templates

2.1.5.1.4 Search Template

The **Search Template** is a specialized Template used to define and save Searches within an Info Database.

Info Items based on the **Search Template** contain a defined search which are used to locate other Info Items that meet the specified criteria.

See Also:
· Search
· Search Pane
· Search Criteria Editor

2.1.5.1.5 Primary Attribute

Every Core Template has a **Primary Attribute** value. The **Primary Attribute** determines what is displayed in the Item Details Pane when an Info Item is selected in Ultra Recall.

See Also:
· Core Templates
· Attributes
· Info Item
· Item Attributes Pane
· Item Details Pane

2.1.5.1.6 Title Attribute

Every Core Template has a **Title Attribute** value. The **Title Attribute** specifies which Attributes the Item Title is derived from (only Info Items based on the Contact Template Group use an alternate *Item Title*).

Note: for Contacts, the Item Title is derived from several attributes.

See Also:
· Core Templates
· Custom Item Titles
· Contact Template
· Attributes
· Info Item
· Template Group

2.1.5.2 Derived Templates

Every Template Info Item is either a Core Template or is a **Derived Template** based on another template (either a Core Template or another **Derived Template**).

You can create, modify or delete any **Derived Template**.

Note: You can create a hierarchy of Derived Templates. One advantage is that adding/removing an attribute from a template will also add/remove it from any templates **derived** from it as well.

See Also:
· Template
· Create
· Modify
· Delete
· Attributes

2.1.5.2.1 Create Template

Creating a new Derived Template is as simple as creating a new Info Item as a child to the system Templates Info Item.

You can rename the template (the name of a template is associated with the *Template Name* Attribute

value). The *Item Title* Attribute value is the default title of new Info Items based on this new Template.

Note: Derived Templates can be derived from other Derived Templates, allowing you to create a hierarchy in your defined templates.

See Also:
- Derived Templates
- Attribute
- Info Item
- Document Summary and Book samples

2.1.5.2.2 Modify Template

Modifying an existing Template is as simple as editing a regular Info Item. You can rename the template, or the default *Item Title*, add, remove or modify any other assigned Attributes, or change the values for any assigned Info Item Attributes.

Note: Ultra Recall will synchronize the Attributes assigned to a Template with the Info Items based this Template according to the following rules:
- **Add:** When Attributes are added to a Template, the Attribute is also added to existing Info Items based on this template (or any Templates / Info Items derived from this Template).
- **Delete:** When an Attribute is removed from a Template, the user is prompted whether Ultra Recall should also remove this Attribute from all Info Items based on this template (if you choose *Cancel*, the Attribute is not deleted from the template).

See Also:
- Derived Templates
- Attribute
- Info Item

2.1.5.2.3 Delete Template

Deleting a Derived Template is as simple as deleting any regular Info Item. Simply delete the Template Info Item or reparent it away from the system *Templates* Info Item (except for the Recycle Bin, which has special behaviour *).

When a template is permanently deleted (not to the Recycle Bin*), any Info Items previously based on this template will be re-assigned the first remaining ancestor template automatically by Ultra Recall.

For example, let's assume you create a template called *Recipe*, derived from the core Text template. You then create some Info Items based on this new *Recipe* template. You later decide you don't want the Recipe template and delete it.

If you permanently delete the *Recipe* template, all existing Info Items based on it will be automatically updated as being based on the *Text* template (the first existing ancestor template of the now removed *Recipe* template)

* When a template is deleted to the Recycle Bin, it continues to function as a template, but new Info Items can't be created based on it and existing Info Items can't be assigned it as a template.

See Also:
- Derived Templates
- Attribute
- Info Item
- Recycle Bin

2.1.5.3 Custom Item Titles

The **Item Title** of an Info Item is the title displayed for an item in Selection Panes (such as the Data Explorer). By default Ultra Recall used the value of the Item Title core attribute for this value, with the exception of the Contact template, which uses a computed value based on the values of several attributes such as *First Name* and *Last Name*.

The actual expression used to define/compute the **title** of an Info Item is defined by the template an Info Item is based on, specifically by the Title Expression template attribute. Most Items have a <u>Title Expression</u> value of *Item Title* as described above; in contrast the Contact template by default uses a <u>Title Expression</u> value of *trim(coalesce([Last Name] || ', ' || [First Name],[Last Name],[First Name], [Company],[Email (work)],[Email (home)],'(New Contact)'))*.

The *Title Expression* attribute of a template can be modified by the user to customize the title formatting for new items based on that template.

Rules and Syntax for <u>Title Expression</u> template attribute values:
- Use a different SINGLE attribute value as title (such as *Date Created*):
  Simply enter the exact name of the attribute you want the Item Title to be based on (ie. *Date Created*)

- Use multiple attribute values or a computation of attribute values:
  To specify an attribute value, enter the name of the attribute value surrounded by [and] (ie. [Date Created].
  Note: The numbers specified in the default Contact template Title Expression value are the underlying attribute values (done for efficiency). This is the contact expression using names: *trim (coalesce([Last Name] || ', ' || [First Name],[Last Name],[First Name],[Company],[Email (Work)], [Email (Home)],'(New Contact)'))*.

  The following functions/operators (following sql convention) are available for use in the *Title Expression* value:
  <u>Functions</u>
  - trim (and *ltrim/rtrim*): trim white space from the value *(or left or right side only)*
  - coalesce(*2 more values*): uses the first non-null value in the provided values, from left to right
  - val(): computes the number in the leading characters of the value (i.e., 123abc = 123)
  <u>Operators</u>
  - ||: the text concatenation operator (i.e., *[Last Name] || ', ' || [First Name]*)
  Note: a NULL || anything equals NULL
  - + - / * and other mathematical operators (i.e., [Some Number attribute name] * 2)

General notes:
- If the template is no longer using the Item Title attribute for the title, you can delete it from the template to avoid confusion.
- Literal values must be contained in single quotes (i.e., 'value') and concatenated with attribute values using the || operator.
- Date/Time attributes referenced in a **Title Expression** will be formatted according to the *Insert date/ time as* Miscellaneous option, which allows you to specify *Custom %Y%m%d* format to give date titles that are sorted by date in the Data Explorer pane.
- If items already exist for the template when you change the Title Expression value, the titles are not automatically refreshed for the existing items until you change an attribute value that is part of the Title Expression.
- If an error occurs evaluating the title expression, the title will be displayed as "SYNTAX ERROR."

Examples:
- **Journal item template:** Some users wish to use Ultra Recall for journaling and have each Info Item be titled with the day it is created. Steps: Create a new template Info Item, set its **Title Expression**

to *Date Created,* define a *Custom Insert date/time as:* option as *%Y/%m/%d* (or similar).

- **Different Contact title:** Perhaps a user wants the title to be First Name, Last Name instead of the reverse. Change the **Title Expression** value of the Contact template to: *trim(coalesce([First Name] || ', ' || [Last Name],[First Name],[Last Name],[Company],[Email (Work)],[Email (Home)],'(New Contact)')).*
- **A title based on 2 or more other attributes:** Assume a template contains a *Part Name* attribute, a *Size* attribute and a *Type* attribute and the title should be equal to *Product: Type: Size.* Create a template with a **Title Expression** value of: *[Part Name] || coalesce(': ' || [Type], '') || coalesce(': ' || [Size], '').*

    See Also:
- Templates
- Template Attributes
- Miscellaneous Options
- Date/Time attribute type
- Selection Panes
- Journal and Vehicle Maintenance Samples

2.1.5.4   Template Group

Each Core Template and all the Templates derived from it constitute a **Template Group**. Any Info Item can switch to any other Template in the same **Template Group**.

The choices provided in the Item Attributes Pane for the Template Item Attribute are all the Templates in the appropriate **Template Group**.

    See Also:
- Template
- Info Item
- Item Attributes Pane

2.1.6   Form

A **Form** defines a custom layout of fields (attributes) to display in the Item Details pane.

Each Template (including System templates) can have a Form attribute value assigned, which defines the **Form** to use when for editing items based on that template.

The Forms Dialog is used to create and modify **Forms** available to be assigned.

Note: Forms are available in the Professional and Viewer edition only.

    See Also:
- Form Attribute
- Forms Dialog
- Item Details pane
- Form Viewer

2.1.7   Item Notes

You can add almost any type of information to Ultra Recall, from files to web pages, to emails to formatted text. Sometimes this information is can't be edited or should not be modified but you still desire to associate additional text with the created Info Item.

You could add an Attribute to "mark up" the Info Item, but if you want to format this information, or add a significant amount of text, the Item Notes Pane is the best place to add this annotation.

See Also:
· Item Notes Pane
· Info Item
· Attributes

2.1.8   Storing or linking to external objects

Any Info Item can reference an external object (web page, local document or folder, Outlook email, contact, appointment, etc). The linkage between an Info Item and the external object is through the *URL* attribute.

Any Info Item based on (or derived from) the Document template has a *URL* attribute that is always present, Info Items based on other templates can optionally have a URL attribute added to them. When the URL attribute contains a valid url value, the Info Item references the specified external object.

Below are the steps to add an *URL* attribute to an existing Info Item:
1. ensure the Item Attributes pane is visible (on the Menu Bar - *View | Other Windows | Item Attributes*, from the keyboard - *Ctrl+4*)
2. click on an attribute in the Item Details pane, then either click *Insert* (keyboard) choose *Edit | Insert* (from the Menu Bar)
3. The **Insert Item Attribute dialog** is displayed. Select (or type) *URL* in the name field, then click *OK* .
4. A new *URL* attribute is now displayed. Enter the appropriate url value in the *Value* column.

Once a valid *URL* attribute is assigned to an Info Item, the item can be Synchronized with that external url. If the *Store Contents* button of the Item Toolbar (also under *Item* on the Menu Bar) is depressed, then the actual external object is stored within the Ultra Recall Info Database.

See Also:
· Attributes
· Menu Bar
· Item Toolbar
· Item Attributes Pane
· Templates
· Document Template
· Store Contents
· Synchronization

2.1.9   Logical Linking

Traditional applications for organizing information use a strict outline type of linkage between different entities. Windows Explorer allows you to create folders, which can contain files. Email applications store each email in one folder (such as the Inbox). Even Internet Explorer favorites or Netscape bookmarks are stored as individual bookmarks which reside in a single folder *only*.

The problem with this method of organization is that often information should be associated with more than one other piece of information. Being limited to creating a folder structure for your organizational needs is very inflexible and makes storing and later recalling the information difficult.

Ultra Recall changes this completely with **Logical Linking** technology. In Ultra Recall these restrictions are eliminated and you can link any Info Item to an unlimited number of logically related Info Items. Any Information Item can be linked to multiple Info Items and can have multiple Info Items linked to it.

Logical Linking is accomplished in the Data Explorer Pane using either the menu, drag & drop or

keyboard shortcuts.

When an Info Item is linked to more than one parent, it is considered to be **multilinked**. Several indications are provided when this is the case:
- Multiple parents will be displayed in the Item Parents Pane when that Info Item is selected
- The icon for the Info Item will have the shortcut arrow symbol in the lower left corner (identical to a shortcut in Windows Explorer)

Note: Any child items of a logically linked item are also implicitly linked (the children are not displayed with a link icon since only the parent is explicitly linked).

In the image below, the *Notes* Info Item is **multilinked** to both the *My Data* Info Item and the *Tasks* Info Item. The Item Parents Pane is displaying both parents (the bold parent indicates the current parent) and the *Notes* icon is indicating multilinking as well.
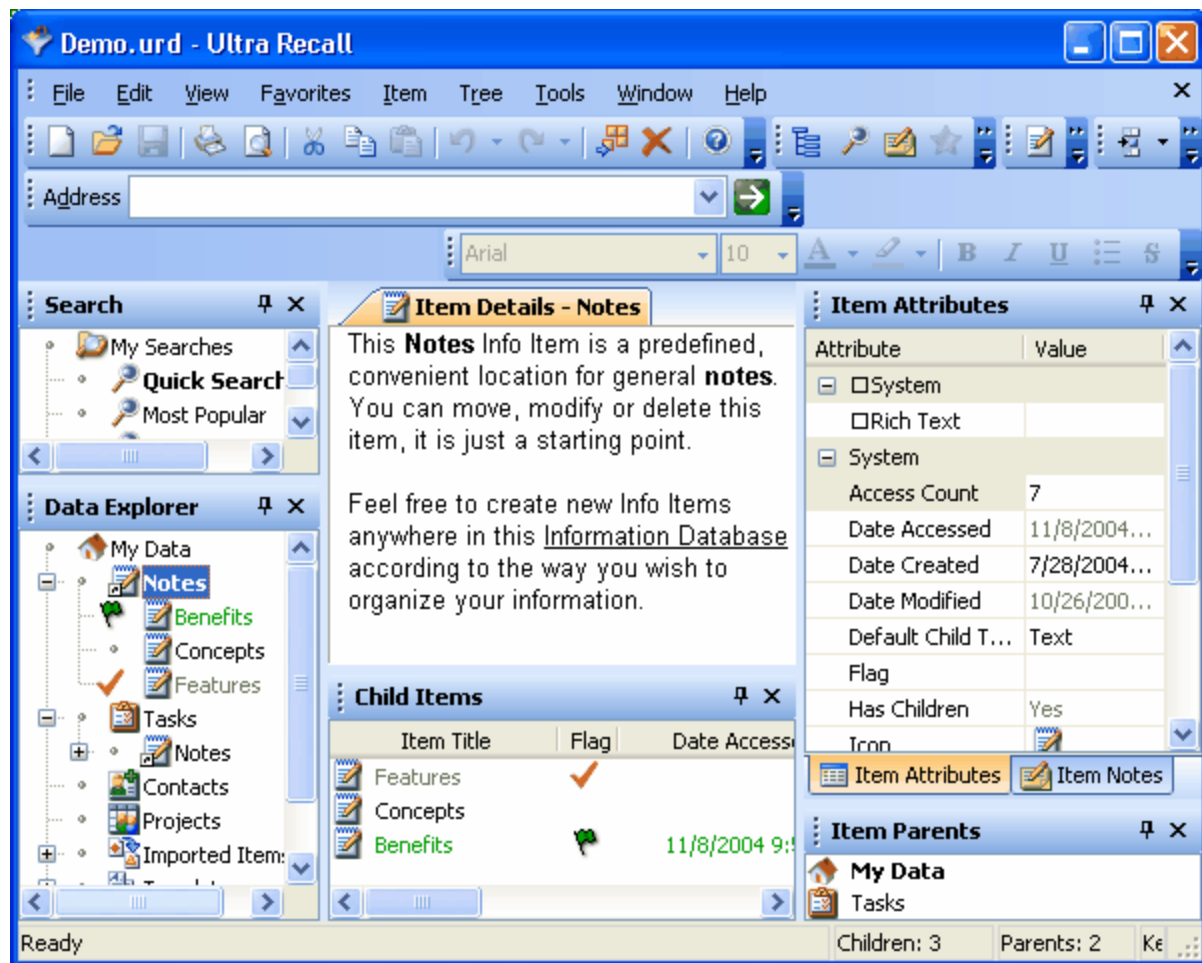
See Also:
- Internal Linking
- External Linking
- Info Item Attributes

2.1.10 Reminders

Any Info Item can have a **reminder** defined, which will instruct Ultra Recall to notify the user at the specified date/time that the Info Item should have some action performed on it (open, edit, delete, etc).

When a Info Item **Reminder** comes due, one of the following reminder actions will occur, alerting the user that the Info Item requires attention:

- Reminder Sound: the actual sound displayed is configurable on the Search/Reminder Options Dialog tab.
- Tray icon balloon
- Reminder Dialog

You can either select one of the predefined **Reminder** values, or enter a manual value (a non-zero number + a predefined denomination). The honored denominations are:

- minute(s)
- hour(s)
- day(s)
- week(s)
- month(s)
- year(s)

Some manually entered **Reminder** value samples:

- 22 minutes
- 5 hours
- 8 days
- 5 weeks

See Also:

- Creating Reminders
- Reminder Notification
- Reminder Options
- Recurring Reminders
- Item Attributes Pane

2.1.10.1 Creating

Info Item **Reminders** are based on the assignment (and population) of the following Attributes (in the Item Attributes Pane):

Attribute	Required?	Purpose
Reminder	Yes	Value assigned determines how much in advance of the actual *Begin Date* user notification occurs
Begin Date	Yes*	Value determines when the Info Item is due
Begin Time	No*	When provided, this value is combined with the Begin Date (or <u>today</u> if not provided) to fully specify the *Begin Date* value
Pending Reminder	No	This read-only System Attribute displays when the reminder will actually be displayed (derived from the appropriate Attribute values)
Recurring	No	When this attribute has a value assigned, when the **Reminder** is dismissed**, the *Begin Date* will be advanced by the increment specified (ie. Daily, Weekday, Monthly, etc), causing the **Reminder** to "reset" for a future reminder notification
End Date	No	When assigned/populated, a **Reminder** won't Recur (advance)** until this *End Date* value has been past
End Time	No	When provided, this value is combined with the *End Date* value to fully specify the *End Date* value

* Populating either (or both) of the *Begin Date* or *Begin Time* attributes will define a "Begin Date" value
** If an *End Date* attribute value is assigned, then a **Reminder** won't advance until after this date/time is past.

Inserting a *Reminder* attribute in the Item Attributes Pane will add other relevant attributes to the selected Info Items, facilitating adding the attributes and appropriate values necessary to define a new

reminder. Inserting a *Recurring* attribute will do the same, facilitating the creation of a recurring reminder.

One button reminder creation: An Item menu entry called *Add Reminder* (default keyboard shortcut of *Ctrl+Shift+R*) will also add the required attributes to define a Reminder is provided. This method is available in every pane of Ultra Recall and automatically focuses the Item Attributes Pane for Reminder data completion.

By default the reminder attributes are assigned to the *Appointment* template, and can optionally be assigned to other templates if desired, facilitating reminder creation on specific types of Info Items.

See Also:
· Reminders
· Notification
· Recurring Reminders
· Reminder Dialog
· Reminder Options
· Item Menu

2.1.10.2 Notification

When an Info Item reminder becomes due, several different notifications are possible, each of which are defined on the Search/Reminders tab of the Options Dialog.

These options can be one or more of the following:
· display a tray notification balloon
· display the Reminder Dialog
· play a reminder sound
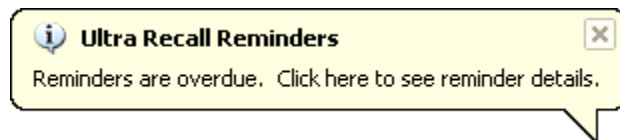
tray notification balloon

See Also:
· Reminders
· Options Dialog
· Reminder Dialog
· Reminder Options

2.1.10.3 Recurring

Reminders can optionally be configured to **recur** or "repeat" on a frequency specified by the value of the *Recurring* attribute.

When a **recurring** reminder recurs, the Info Items's *Begin Date* attribute value is advanced by the value specified by the Info Item's *Recurring* value. In addition, when a reminder is first recurred (after being dismissed via the Reminder Dialog) an *Original Begin Date* auto attribute is added with the initially specified *Begin Date* attribute value.

The Reminder will recur when either one of the following events occurs:
· The reminder is <u>dismissed</u> with the Reminder Dialog (and the *End Date* attribute value (if specified) is passed)
· The *End Date/End Time* combination is passed (if specified) or *Begin Date/Begin Time* combination is passed when visual reminder notifications are not being displayed (specified on the Search/

Reminder tab of the Options dialog)

You can either select one of the predefined **Recurrence** values, or enter a manual value (a non-zero number + a predefined denomination):
* second(s)
* minute(s)
* hour(s)
* daily / day(s)
* weekday(s) (Monday through Friday only)
* weekly / week(s)
* monthly / month(s)
* quarterly / quarter(s)
* yearly / year(s)
Some manually entered **Recurring** value samples:
* 2 days
* 1 weekday (ie, a Friday Begin Date will advance to the following Monday)
* 8 weeks
* 2 quarters
* 3 years

Note: The read-only *Pending Reminder* Auto System attribute will display when the reminder is set to occur, which will also advance when the Info Item recurs.

See Also:
* Creating Reminders
* Reminder Notification
* Reminder Options
* Options Dialog
* Attributes
* Auto Attributes

2.1.11 Flag

Each Info Item has an Attribute named **Flag**, which is used to mark Info Items with several colors to further highlight information for any purpose. Items with a Flag value of *Completed* can also be hidden by toggling the *Show Completed Items* command on the View menu (Professional edition only).

You can assign a the **flag** to an Info Item from many locations:
* Search Pane
* Data Explorer Pane
* Related Items Pane
* Item Attributes Pane
* Flag Toolbar

The flag color can be used for the text in the Data Explorer Pane, Search Pane, Related Items Pane and the Item Parents Pane based on the Options Dialog checkbox under *Grids* called *Use flag color for item text color.*

The flag will be displayed in the Data Explorer Pane and Search Pane based on the Options Dialog checkbox under *Tree* called *Show item flag icon in tree.*

In the image below, both the **flag** and **flag** color are being displayed in the Data Explorer Pane and the Related Items Pane:
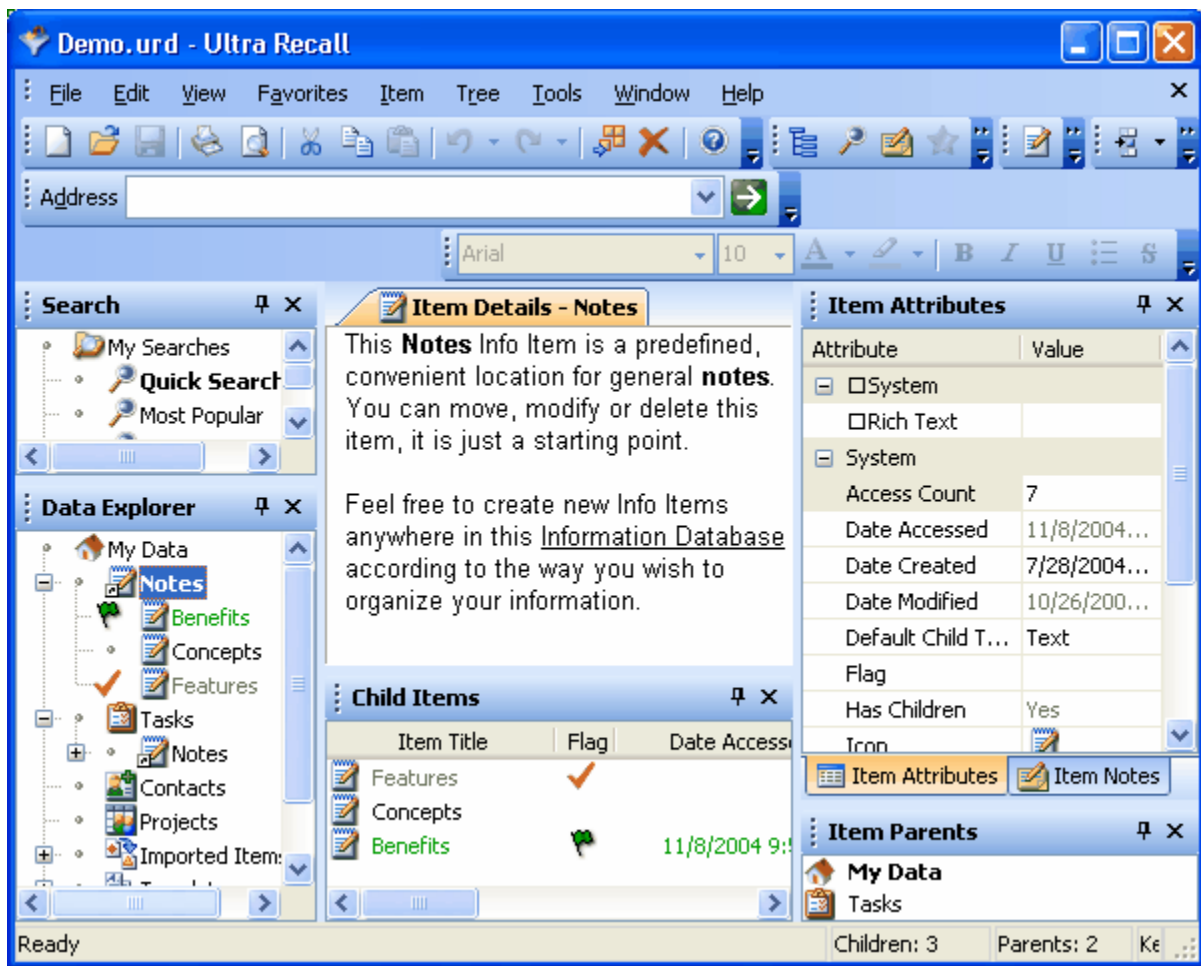
See Also:
- Options Dialog
- Tree Options (show flag in tree option)

2.2 Create an Info Database

When you start Ultra Recall for the first time, you need to **create** an Info Database to add information to.

To **create** your first Info Database, on the Menu Bar click on *File | New*:
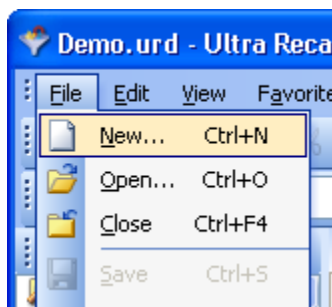
In the displayed *New Database* dialog, select the location and filename of the new Info Database, then

click *Save*:
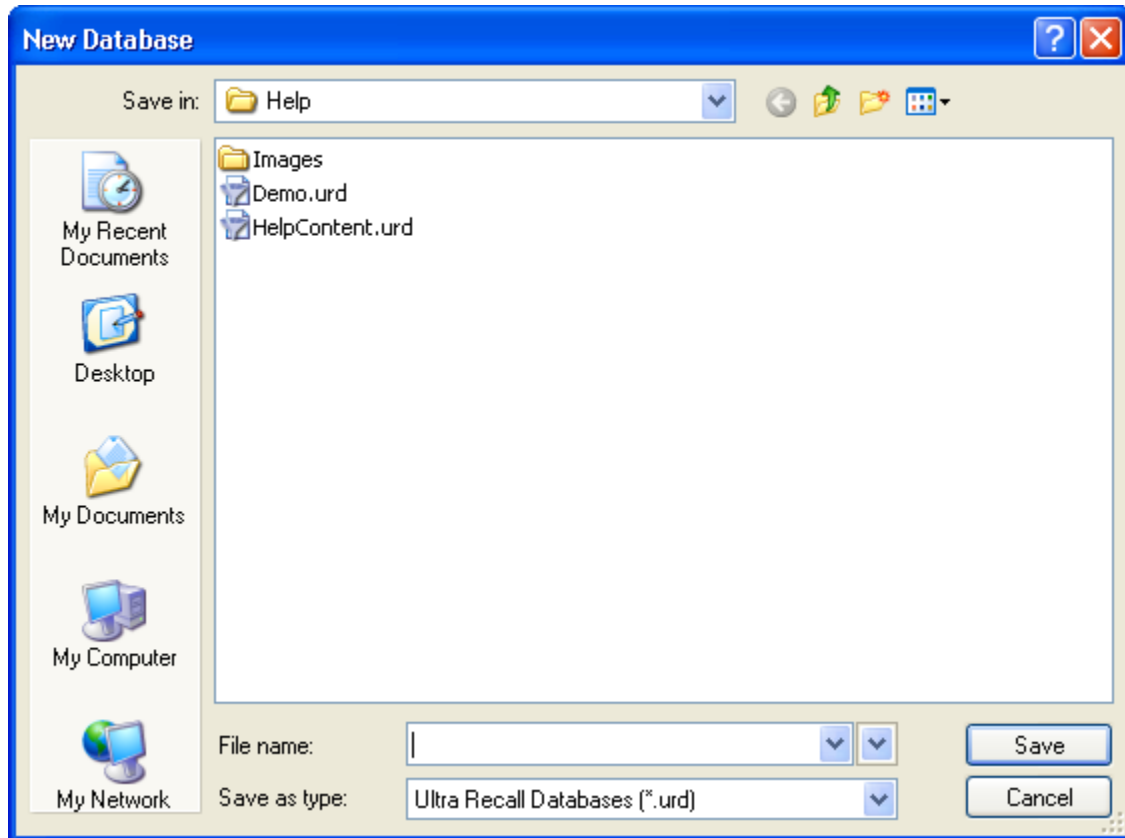
Congratulations, you have **created** your first Info Database, and you're ready to start using Ultra Recall
. In the image below you can see a new Info Database named *Demo* displayed.
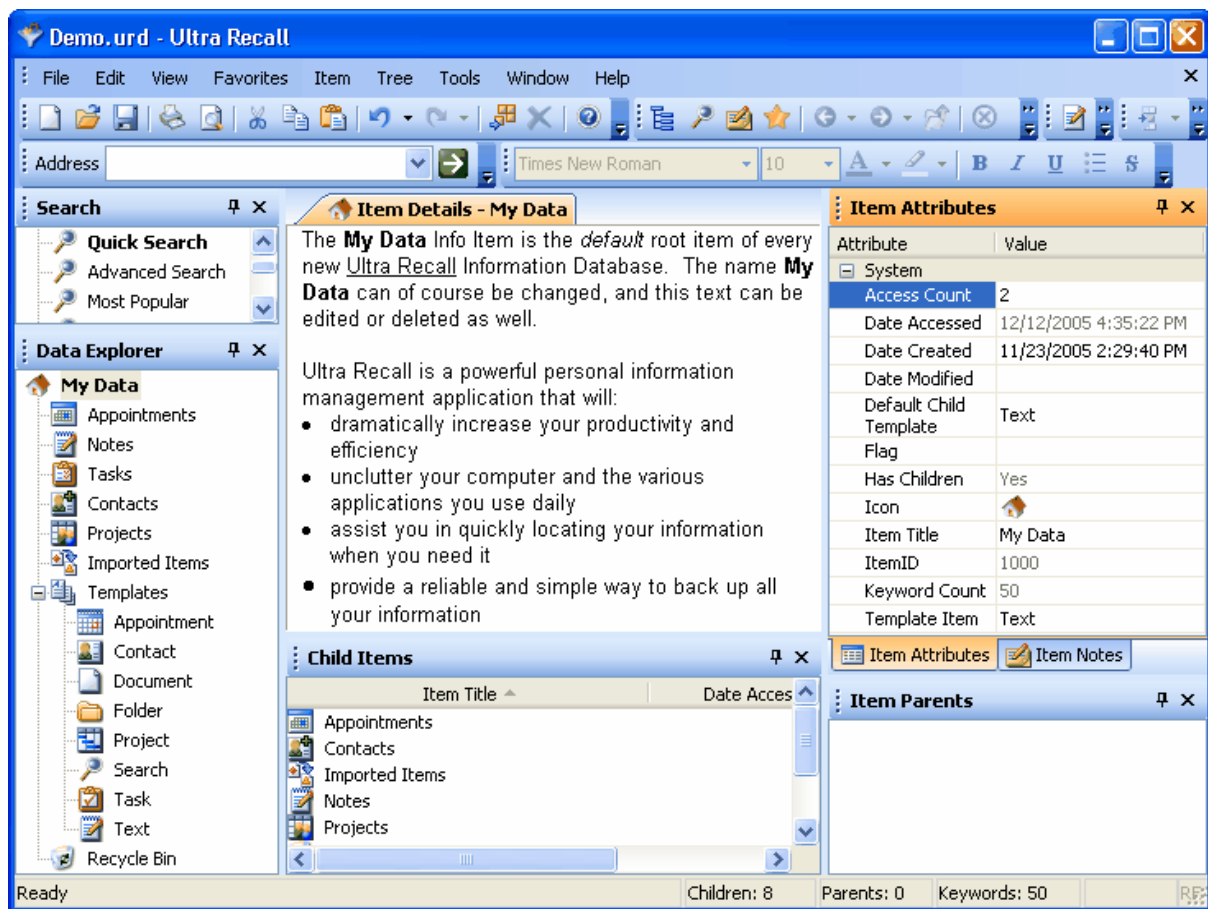
2.3 Create an Info Item

As was mentioned in Basic Concepts, an Info Item is a single piece of information that is stored in Ultra Recall.

We'll start with something basic, creating a new Info Item of text by simply typing it into Ultra Recall.

Let's **create** a *note* under the *Notes* Info Item:

1) Select the *Notes* Info Item in the Data Explorer Pane:
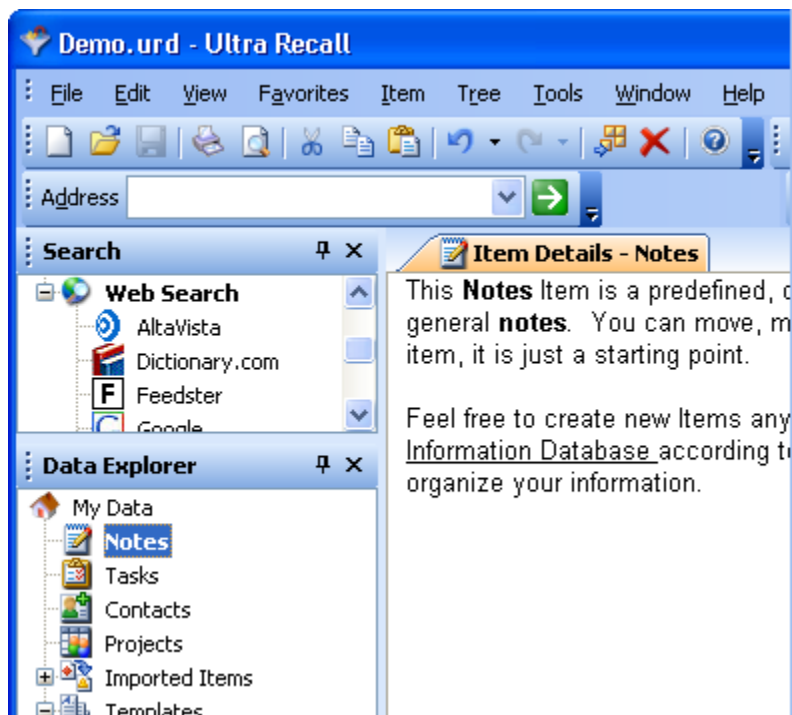
2) Create a new Child Info Item of the *Notes* Info Item in the Data Explorer Pane:
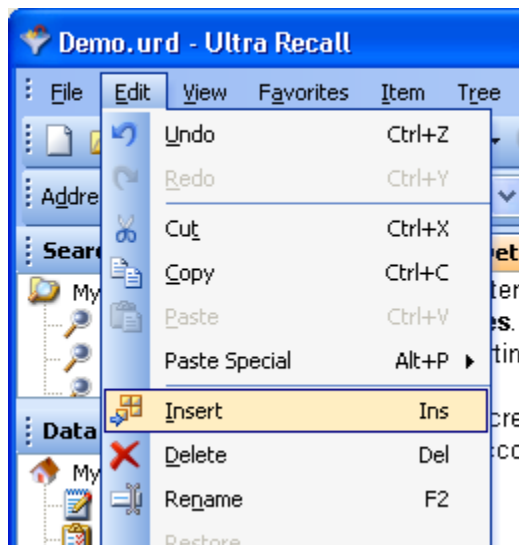
3) Give the new Info Item an appropriate title (simply type a title then click the *ENTER* key):
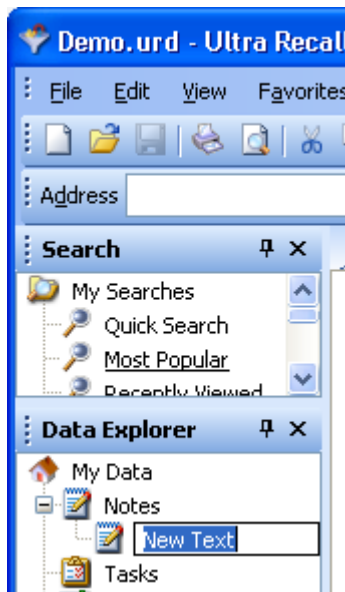
4) Type the text of the note Info Item into the Item Details Pane (click in the Item Details Pane and type):
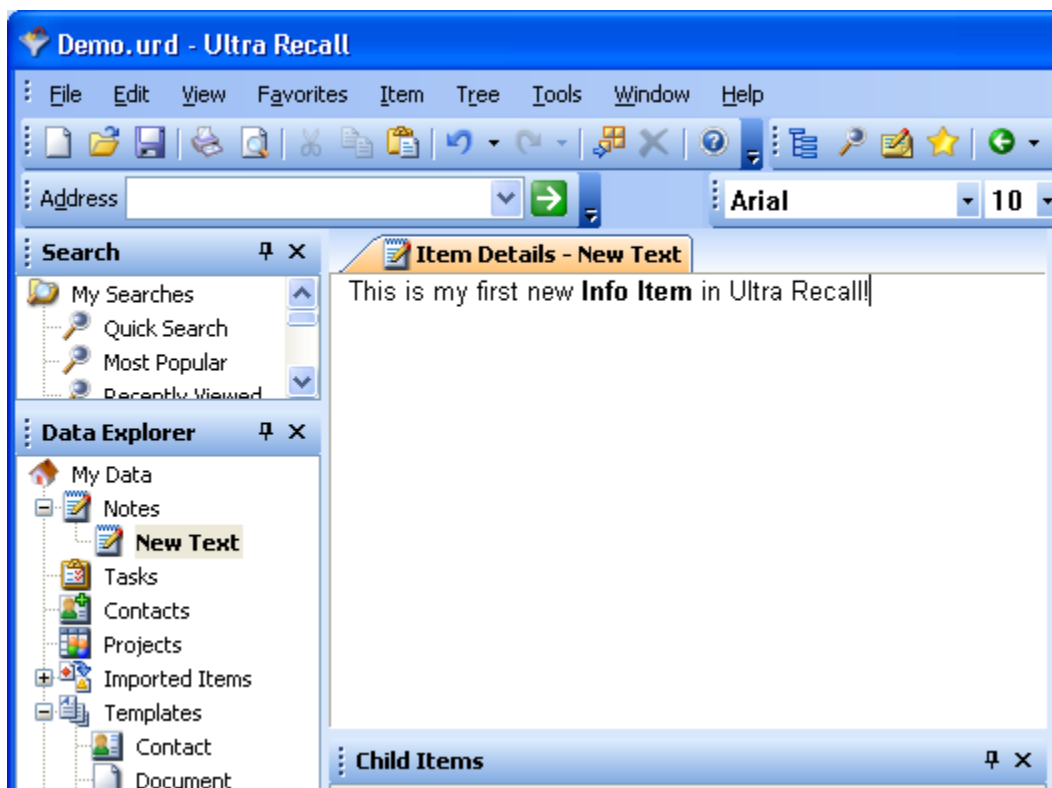
You've just **created** your first Info Item. Continue to the Using Ultra Recall topics for more information on using Ultra Recall.

See Also:
- Drag & Drop
- Copy And Paste

- Capture
- Direct Text Entry

2.4 Samples

Several sample Info Databases are provided to demonstrate the features and advantages of Ultra Recall. The samples are located in the *Ultra Recall Samples* subfolder of the *My Documents* folder and are also accessible from the Start Menu at *Programs -> Ultra Recall -> Samples* (if included during installation).

Note: The sample databases are not overwritten when reinstalling or removed when uninstalling (since the user can modify or add their own data). To delete the samples completely (or to install the latest samples when reinstalling), open the *My Documents* folder (Start Menu -> Documents) and delete the *Ultra Recall Samples* subfolder.

Included Samples

Books.urd demonstrates managing a database of books in Ultra Recall.

Contacts.urd shows how to manage a list of contacts and related reminders.

Document Summary.urd demonstrates capturing document summary information as attributes and/or text when importing, importing icons into Ultra Recall for use within an Info Database, custom Stored Document Templates (for creating Microsoft Office or other documents directly within Ultra Recall) and much more.

Intro.urd provides an introduction to Ultra Recall and its potential uses.

Issue Tracking.urd contains issues discovered and fixed during development of Ultra Recall and demonstrates the use of Flags, advanced searches, a custom template, Limited Searches, and more.

Journal.urd demonstrates keeping a journal and utilizing custom templates, layouts, and advanced searches.

Web.urd shows how to use Ultra Recall for managing web bookmarks and performing web research.

Professional Edition only

Advanced Search.urd shows some uses for Nested Searches, relational operators, and other advanced searches.

Cameras.urd demonstrates the use of a custom template, custom attributes, a customized Related Items Pane layout, multiple column sorting, and some advanced searches.

GTD.urd shows one way to manage a Getting Things Done process in Ultra Recall, utilizing flags, custom attributes, advanced searches, and nested searches.

Outlook.urd demonstrates use of Ultra Recall's extensive Outlook synchronization capabilities.

Software Inventory.urd demonstrates icon retrieval of documents, advanced searches, hierarchical organization in the Data Explorer Pane, Limited Searches, a custom template, and more.

Vehicle Maintenance.urd shows how to keep track of vehicle maintenance by utilizing composite templates, column layouts, reminders, forms, custom item titles, and more.

3   Using Ultra Recall

There are several fundamental concepts that once understood, will make using Ultra Recall more intuitive and enable you to use the advanced features of Ultra Recall to your benefit.

These fundamental usage concepts include:
- General
- Capturing Information
- Organizing Information
- Viewing Information
- Recalling Information
- Managing Documents and Files
- Helpful Features
- Getting Things Done (GTD)

3.1   General

By default, Ultra Recall starts and opens the most recently used Info Database (this can be avoided by holding the Shift key at application start).

Ultra Recall data is stored in Info Databases, each instance of Ultra Recall can open one Info Database.

Ultra Recall is an SDI app (only one file can be open at a time), but multiple instances of Ultra Recall can be started (each for a different Info Database).

To start, simply create a new Info Database and begin adding information to it. If you want to keep data in more than one location or want to segregate your information in more than one file, simply create additional Info Databases to suit your needs. You can open as many Info Databases simultaneously and move Info Items between them easily.

3.2   Capturing Information

A powerful feature of Ultra Recall is that documents and information from almost any Windows application can be stored in it, with automatic capture of contents, text, summary information, icons, and more.

Some examples of information that can be easily added to Ultra Recall include:
- Internet Explorer favorites and Firefox, Netscape or Mozilla bookmarks
- Web pages or parts of a web page from browsers like Internet Explorer and Firefox
- Emails, tasks, appointments, contacts, and notes from Microsoft Outlook
- Email messages from Outlook Express, Windows Mail, Windows Live Mail, The Bat!, Mozilla Thunderbird, and Postbox
- Documents from Microsoft Office applications (Word, Excel, and PowerPoint)
- OpenDocument files (ODF)
- Text, rich text, XML, PDF documents
- Images and pictures
- Files and folders from Windows Explorer
- TIFF documents containing OCR text (Microsoft Office Document Imaging)
- ActionOutline files
- mbox (message) files from email applications
- TreePad files
- Any application that can export to RTF, CSV, XML/OML/OPML, or text formats

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Methods available for importing data into Ultra Recall include:
- Capturing with Drag and Drop
- Capturing with Copy | Paste
- Explorer/Internet Explorer toolbars
- Microsoft Outlook toolbar
- Firefox toolbar
- Thunderbird/Postbox toolbar
- Direct Entry
- Send To
- Import Dialog
- Global hot key
- Automatic clipboard capture

When files, web pages or other external information/files are **added** to Ultra Recall, an Info Item based on a Template in the Document Template Group is created. Along with all the normal features that are supported for all Info Items, including Attributes, Keywords, Item Notes, etc., you have the option of storing the actual file as part of the Info Item.
1) *Not Stored*: The actual information or file resides in the original location, the created Info Item contains a *URL* Attribute containing a valid URL for the document.
2) *Stored Contents*: The actual document is also stored within the Info Database. It is automatically compressed for maximum storage efficiency (typically it is compressed enough to store both the file and the other data maintained by Ultra Recall in the same or less space than the original document size).

Note: The *Store contents when importing or syncing files, web pages, and Outlook items* option on the Import options page determines whether documents and web pages will be stored or linked by default when importing.

3.2.1　Capturing Info with Drag And Drop

Drag and Drop is the Windows method of moving information around with the mouse. Ultra Recall has extensive **drag and drop** capabilities, as outlined below.

Ways to **drag and drop** information into Ultra Recall:
1. Click and hold either the left or right mouse button over a URL or other information you wish to add to Ultra Recall.
2. Move the mouse to the location in the Data Explorer Pane where you want to place the information.
3. Release the depressed mouse button.
   - *Left button drag*: Performs the default action, which is to create an Info Item that does not Store Contents.
   - *Right button drag:* A menu of choices will be presented, giving you the available drop options:
     - *Link Here***:** Create an Info Item that contains information about the item but does not store the contents if a document or URL was dragged.
     - *Copy Here***:** Create a Info Item that has Stored Contents.
     - *Move Here***:** Create a Info Item that has Stored Contents, then delete the original document (if local) to the Windows Recycle Bin.

Note: URLs from any location, including the Web Toolbar, external browsers, text or other locations can also be dropped on String Attributes in the Item Attributes Pane

See Also:
- Commands & Procedures | Drag And Drop
- Data Explorer Pane
- Store Contents

· Import options

3.2.2   Capturing Info with Copy And Paste

Copy And Paste is the menu (and keyboard) method of copying/moving information in Windows (and Ultra Recall).

Basic Steps to **Copy and Paste**:
1) Select what you want to copy (text or Data Explorer Pane items in Ultra Recall or a *URL*, icon, file(s), folder(s), selected text, etc., from another application) with the mouse or keyboard shortcuts.

2a) *Menu:* Click *Edit | Copy* to place a copy of the selection to the clipboard *-or-*
2b) *Keyboard:* Type *Ctrl+C.*

3a) Within Ultra Recall, navigate to the location you want to place what is now on the clipboard *-or-*
3b) *Keyboard:* Type the global import clipboard hot key (default is *Win+V*) to paste the data into Ultra Recall without activating Ultra Recall *-or-*
3c) *Mouse:* Right-click on the Ultra Recall system tray icon and choose Paste Clipboard Contents.

Only if 3a was performed
4a) *Menu:* Click *Edit | Paste* to place what is on the clipboard to the selected location *-or-*
4b) *Keyboard:* Type *Ctrl+V* to paste or *Ctrl+Shift+V* (to force storing of contents).

Notes:
Cut: If instead of using Copy (Ctrl+C), you use Cut (Ctrl-X), what is placed on the clipboard will be deleted from the source location when a paste action is accomplished.

PASTE SPECIAL: Alternative Paste options are available from the *Paste Special* (*Alt-P*) sub menu.
· *Duplicate:* Make a copy of what is on the clipboard
· *Duplicate Single:* Paste only the Info Items on the clipboard, but not their child Info Items
· *Paste Text:* If the information on the clipboard has a text format, paste this format into Ultra Recall
· *Paste Rich Text:* If the format on the clipboard has a rich text format, paste it into Ultra Recall
· *Paste Html:* If *HTML* is on the clipboard, paste that format into Ultra Recall

See Also:
· Copy and paste from external applications
· Store Contents
· Import options

3.2.3   Direct Text Entry

You can also enter **formatted text** directly into Ultra Recall by creating a new Text Info Item, then **entering** the text (with formatting as desired).

Steps to directly enter text into an Ultra Recall Info Database:
1) Navigate to the location in the Data Explorer Pane where you want to add the new Info Item (for the new text)
2) Insert a new Child or Sibling Info Item *
   a) Using the Default Child Template: *Edit | Insert* (menu) or hit the *Insert* key (keyboard shortcut)
   b) Manually specify the Text template: *Tree | Insert Child | Text* (menu) or *Alt+Insert | Text* (keyboard shortcut)
3) Type the text in the Item Details Pane, adding formatting as desired (using the Format Toolbar)

* To enter text, a template based on the Text Core Template must be used.

See Also:
· Create An Info Item

- Templates
- Core Templates
- Text Template
- Default Child Template
- Child Info Item
- Sibling Info Item

3.2.4   Explorer/Internet Explorer Integration

If the *Add Shortcuts to Explorer Send To menu and Internet Explorer context menu & toolbar* box is checked during installation*, both Windows Explorer and Internet Explorer are customized to better integrate with Ultra Recall.

Windows Explorer Send to Menu: Two entries are added to the Windows Explorer Send To menu:
- *Ultra Recall (copy)* - the selected files will added as new Info Items† (contents stored) in the last opened Info Database
- *Ultra Recall (link)* - the selected files will be linked as new Info Items† in the last opened Info Database

Note: The *Send To* menu is available from the *File* main menu or by right-clicking one of the selected files.

Internet Explorer Context Menu: Two entries are added to the Internet Explorer context menu:
- *Ultra Recall (copy)*
  - if some or all of the page content is selected: the selected content will be copied as a new Info Item † in the last opened Info Database.
  - if no content on the page is selected: the entire page will be added (contents stored) as a new Info Item† in the last opened Info Database
- *Ultra Recall (link)* - the current page will be linked as a new Info Item† in the last opened Info Database.

Windows Explorer and Internet Explorer Toolbars: An <u>Ultra Recall</u> toolbar with following two buttons is made available to both Windows Explorer and Internet Explorer (right-click on the Explorer/Internet Explorer menu bar or a toolbar and select Ultra Recall to display the toolbar):
- *Link to Ultra Recall*: accomplishes the same functionality as the respective context menu entries documented above.
- *Copy to Ultra Recall*: accomplishes the same functionality as the respective context menu entries documented above.

* You can re-install Ultra Recall to enabled this feature. Reinstallation is as simple as re-running the installation executable.

† The new Info Items will be created either at the selected Info Item or the *Imported Items* Info Item based on the *Insert imported items at selected item in Data Explorer pane* option.

Note: Selecting part or all of the web page before importing may be needed when importing a secure page (for instance, an order receipt page) or a page behind a login so that the already-loaded page gets stored instead of attempting to retrieve the page again online.

Note: Maxthon is also fully supported, including using the right-click menus and IE Toolbar. To enable the IE Toolbar in Maxthon, ensure the IE Toolbar is installed as mentioned above, then check both toolbar buttons in Maxthon at *Options | Maxthon Options | Plugin | IE Plugin <tab>*.

Note: When Info Items linked to local files are permanently **Deleted** using *Shift+Del* or *Ctrl+Shift+Del*, the corresponding local files are also deleted to the Windows Recycle Bin. This is a convenient way to

delete the Info Items and their related local files in a single step from within Ultra Recall. *If the Info Item(s) are first deleted to the Ultra Recall Recycle Bin, then permanently deleted, the local file will NOT be deleted.*

See Also:
· Installation
· Store Contents
· Import Dialog
· Import Options
· Capturing Information

3.2.5　**Microsoft Outlook Integration**

Ultra Recall includes the ability to link or store objects from Microsoft Outlook 2000 through 2013. Outlook Synchronization can be used to create new or update existing Outlook objects from within Ultra Recall.

The Outlook objects supported include:
· Messages (emails)
· Contacts
· Appointments
· Tasks
· Notes

Outlook objects can be added to Ultra Recall using the following methods:
· Outlook toolbar *Link to Ultra Recall* and *Copy to Ultra Recall* buttons (an Ultra Recall **Outlook Toolbar** can be installed by checking the appropriate checkbox during installation of Ultra Recall).
· Copy & Paste
· Drag & Drop
· Direct *URL* entry, using the GUID-format output of the free Windows Linker utility or a valid URL like *Outlook://Personal Folders/Contacts*
· Synchronization of Outlook folders to Ultra Recall items.

Note: When Info Items linked to Outlook Items are permanently **Deleted** using *Shift+Del* or *Ctrl+Shift+Del* and the related option is checked, the corresponding Outlook items are also deleted to the Outlook Deleted Items folder. This is useful to remove obsolete appointments and tasks which otherwise linger in Outlook data files. If the Info Item(s) are first deleted to the Ultra Recall Recycle Bin , then permanently deleted, the corresponding Outlook objects will NOT be deleted.

To edit stored *Contact*, *Appointment* and *Task* objects externally, add *.msg* to the *File extensions to open stored documents writeable* file extension list on the Documents tab of the Options Dialog.

See Also:
· Drag & Drop
· Copy & Paste
· Capturing with Drag & Drop
· Capturing with Copy & Paste
· Outlook "field" mapping
· Outlook Synchronization
· Storing contents
· Import Options
· Extension Lists

Note: Available in the Professional edition only. The 64-bit edition of Outlook is not supported.

3.2.5.1   Outlook "field" mapping

Outlook objects (such as Contacts and Appointments) contain "fields" which are very similar to Ultra Recall attributes. When an Outlook object is linked or stored in Ultra Recall Professional, many Outlook "field" are **mapped** to related, System Ultra Recall attributes.

While some attributes are pre-defined and the mapping to these attributes is fixed, other Outlook "fields" are also supported and will map to user-defined Ultra Recall attributes if you create the attribute with a name matching the Outlook "field" name (in English).

> **See Also:**
> - Fixed "field" mapping
> - User-defined "field" mapping
> - Synchronization
> - Outlook Synchronization
> - Attributes
> - Item Attributes Pane
> - User-defined keywords

3.2.5.1.1 User Field Mapping

Many other Outlook "fields" exist, for which pre-defined user-defined attributes do not exist, and therefore are not mapped to Ultra Recall automatically. Most of the common fields as well as user-defined fields in Outlook are supported in Ultra Recall and can be mapped to user-created attributes by creating them with the same name as the Outlook "field" (as defined below)**.

Since the actual "name" of pre-defined Outlook fields cannot be obtained from Outlook, the name used by Ultra Recall for the mapping is defined by Ultra Recall (in English)**. The following table defines which additional Outlook predefined "fields" are supported and what the name to map is (a case-insensitive match is used):

Additional Outlook "fields" supported by Ultra Recall:

Outlook "Field" name (as defined by Ultra Recall)	**Type** (recommended as Attribute Type)
Home Address*	String (multiple lines)
Home City*	String
Home State*	String
Home Postal Code*	String
Home Country*	String
Business Address*	String (multiple lines)
Business City*	String
Business State*	String
Business Postal Code*	String
Other Address*	String (multiple lines)
Other City*	String
Other State*	String
Other Postal Code*	String
Business Fax	String
Home Phone 2	String
Assistant Phone	String
Callback Phone	String
Car Phone	String
Other Phone	String
Other Fax	String
Job Title	String
Prefix	String
Suffix	String
Birthday	Date

Anniversary	Date
E-mail 3	String
IM Address	String
All Day Event	Boolean
Complete	Boolean
File As	String
Private	Boolean
Role	String

* The *Address*, *City*, *State*, *Postal Code* and *Country* System attributes defined in Ultra Recall Professional are mapped (fixed) to the Address "fields" in Outlook which are defined as the "mailing address". User attributes can also be defined for these "fields" and mapped in addition to the pre-defined System attributes.

** Outlook user-defined fields are retrieved with the name you have defined in Outlook.

Note: The *Outlook.urd* sample has many of these **User field mapping** attributes defined (such as *Private*, *Assistant Phone*, *Other Address*...).

See Also:
- Outlook "field" mapping
- Fixed Field mapping
- Outlook integration
- System attributes

3.2.5.1.2 Fixed Field Mapping

Below are the fixed mapping between Outlook object "fields" and the related System Ultra Recall attributes.

Ultra Recall	**Outlook**
	Email Messages
From	From address
To	To address
CC	CC address
BCC	BCC address
Message Date	Message Date
	Contacts
First Name	First name (of full name)
Middle Name	Middle name (of full name)
Last Name	Last name (of full name)
Address	Home/Business/Other Address
City	Home/Business/Other City
State	Home/Business/Other State
Postal Code	Home/Business/Other Postal Code
Country	Home/Business/Other Country
Work Email	Email
Home Email	Email 2
Phone (work)	Business (phone)
Phone (home)	Home (phone)
Phone (fax)	Business Fax (phone)
Phone (mobile)	Mobile (phone)
Website	Web Page address
<user-defined keywords>	Categories
	Others
Item Title	Subject
Begin Date	Start
Begin Time	Start

End Date   End
End Time   End
Flag   Status
Location   Location
Reminder   Reminder
Recurring   Recurrence (various)
Due Date   Due Date
Company   Company
Percent Completed   Percent Completed
Priority   Priority
Actual Work   Actual Work
Total Work   Total Work
<user-defined keywords> Categories

See Also:
· Outlook "field" mapping
· User field mapping
· Outlook integration

3.2.6   Firefox Integration

Mozilla Firefox toolbar buttons and context menu entries are provided to quickly and easily import the current web page, a selected web snippet or even all tabs from Mozilla Firefox directly into Ultra Recall .
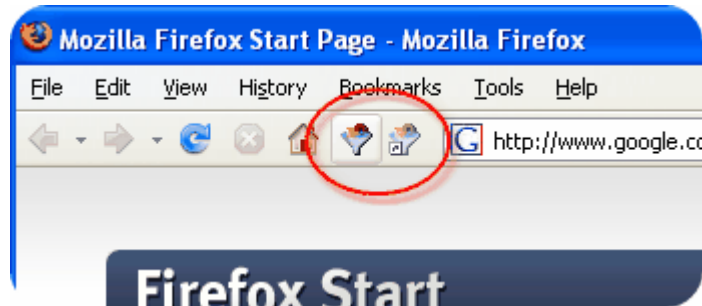
Toolbar buttons

Context menu (available from a right click)
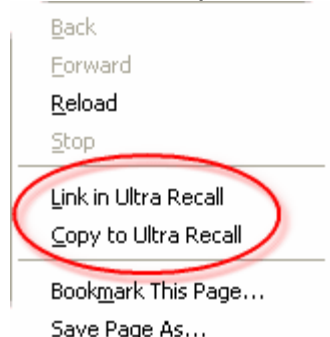
Copy to Ultra Recall: Clicking this button or context menu entry will create a new Info Item in Ultra Recall, storing the entire web page* (or only the selected part of the web page if part or all (Ctrl+A) of it is selected first).
Link in Ultra Recall: Clicking this button or context menu entry will create a new Info Item for the current web page*, as a link to the actual url.

Note: Selecting part or all of the web page before importing may be needed when importing a secure page (for instance, an order receipt page) or a page behind a login so that the already-loaded page gets stored instead of attempting to retrieve the page again online.

* Holding down the Shift key when clicking either button will create a separate Info Item for each tab in this instance of Firefox, either linked or stored depending on which button is clicked.

Installation (use one of these two methods):
- Check the "Install Firefox/Thunderbird/Postbox toolbar extensions" checkbox during installation of Ultra Recall (*note:* the method will also install to the default user profile).
- Navigate to http://www.kinook.com/UltraRecall/extensions.html with Firefox and click the link to install the Firefox extension.

What if the toolbar buttons aren't displayed in Mozilla Firefox: When installed, the extension attempts to add two toolbar buttons on the default *Navigation Toolbar*.
1) In Firefox, ensure the *Mail Toolbar* is displayed (View | Toolbar, ensure *Navigation Toolbar* is checked)
2) Again in Firefox, use the following procedures to move the toolbar buttons from the toolbar palette to the desired toolbar
  a) Click View | Toolbars | Customize
  b) Drag the desired Ultra Recall toolbar buttons from the dialog to the desired toolbar
  c) Click Done

Compatibility:
- Firefox 1.5+
- Ultra Recall 3.1+

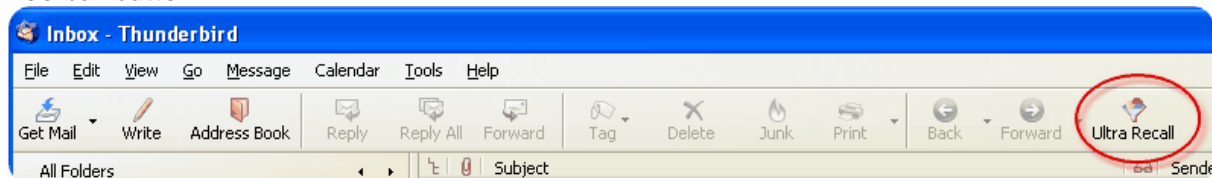**See Also:**
- Mozilla Firefox
- Importing Firefox bookmarks
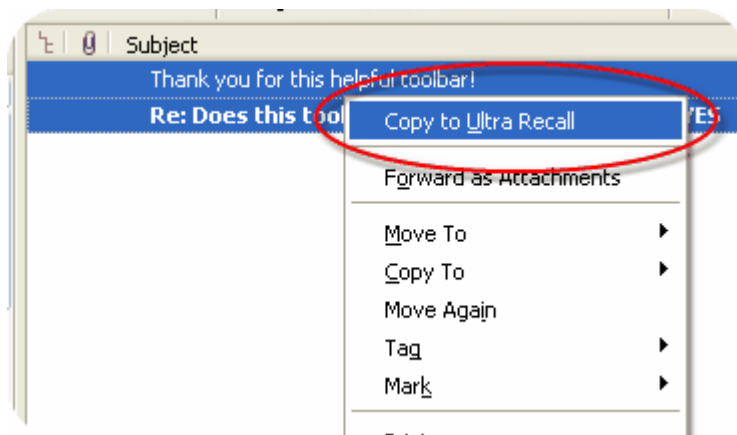- Store Contents
- Import options

3.2.7   Thunderbird/Postbox Integration

A Mozilla Thunderbird / Postbox toolbar button and context menu is available to quickly and easily import the selected emails from Mozilla Thunderbird and Postbox directly into Ultra Recall.

Toolbar button

Context menu (available from a right click)

Copy to Ultra Recall: Clicking the button or context menu entry will create a new Info Item in Ultra Recall for each selected email (storing the entire email message with attachments in Ultra Recall).

Installation (use one of these two methods):
- Check the *Install Firefox/Thunderbird/Postbox toolbar extensions* checkbox during installation of Ultra Recall (this method will only install to the default user profile).
- Navigate to http://www.kinook.com/UltraRecall/extensions.html in a browser, download the Thunderbird/Postbox extension, then install it via *Tools | Addons | Extensions | Install* in Thunderbird/Postbox.

What to do if the toolbar button isn't displayed in Mozilla Thunderbird or Postbox:
- In Thunderbird/Postbox:
  a) Right-click on the toolbar and click *Customize Toolbar*
  b) Drag the *Ultra Recall* toolbar button from the dialog to the desired toolbar
  c) Click *Done*

Note: Make sure the *Use document title for item title if available* option on the Import (More) option page is checked in order for Ultra Recall to use the message subject for the item title (instead of email1.eml).

Compatibility:
- Thunderbird 1.5+
- Postbox 1.1+
- Ultra Recall 3.1+

See Also:
- Mozilla Thunderbird
- Postbox
- Storing Contents
- Importing mbox files
- Import options

3.2.8   Importing Data

Ultra Recall provides extensive ways to import existing data, including:
- Internet Explorer favorites
- Firefox, Netscape or Mozilla bookmarks
- Local files
- The contents of a folder
- Web pages

- Delimited text files (CSV, etc)
- Text and rich text files (even with user defined delimiters)
- XML files
- ActionOutline files
- TreePad files
- Import options

3.2.9   Send To

Ultra Recall adds menu items to the Windows Explorer Send To menu for importing documents and folders into Ultra Recall.

To use this functionality, right-click on file(s) or folder(s) in Explorer, click the Send To menu, and then choose *Ultra Recall (copy)* to import the file, storing the file contents in the Info Database, or *Ultra Recall (link)* to create an Info Item with the file's text, icons, summary information but without storing its contents.

3.3   Organizing Information

Every Info Item is stored in an Ultra Recall Info Database in relationship to other Info Items.

Every Info Database contains a root Info Item (default name is *My Data*). All other Info Items are parented to this and/or other Info Items.

These Info Item relationships are created and maintained using the Data Explorer Pane in Ultra Recall. While the Data Explorer Pane works in a manner similar to Windows Explorer, which you might be familiar with, it has additional features that, combined with the other parts of Ultra Recall, provide significantly improved capabilities and functionality.

There are several ways that can be used simultaneously to organize information in Ultra Recall:
- Relationships: unlimited relationships can be defined between Info Items using Logical Linking technology
- Internal Linking: links to other Info Items can also be added within the content of Text items.
- External Linking: hyperlinks to external web pages and other documents can be inserted in Text items.
- Templates: each Info Item in Ultra Recall is based on a template which can help organize and manage information
- Attributes: each Info Item contains several Attributes, which help add structure and eases organization, comparisons and future searches
- Searches: Searches can be saved that locate and group Info Items in a pattern which facilitates organization and viewing

See ways to organize Information:
- Relationships
- Templates
- Attributes
- Searches

3.3.1   Relationships

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In managing the relationships between different Info Items, several actions are used:
- Create new Info Items
- Move existing Info Items
- Duplicate existing Info Items
- Link existing Info Items
- Delete Info Items

3.3.1.1 Create Relationships

New Info Items can be added anywhere in an Info Database with a variety of methods. See Capturing Information for more details. Each new Info Item is a child Info Item of existing items which constitutes a relationship between these Info Items.

Once Info Items exist in an Info Database, they can repositioned in relation to other Info Items, or linked to additional Info Items creating additional relationships.

See Also:
- Creating Info Items
- Move
- Duplicate
- Link
- Delete

3.3.1.2 Move Info Items

There are multiple ways to **move** an Info Item in Ultra Recall:
Cut & Paste
Drag & Drop: *Move is the default action*

3.3.1.3 Duplicate Info Items

There are multiple ways to duplicate existing Info Items in Ultra Recall:
- *Copy* then *Paste Special | Duplicate* or *Duplicate Only*
- Drag & Drop *(with Ctrl key depressed)*

3.3.1.4 Link Info Items

There are multiple ways to **logically link** existing Info Items to additional Info Items in Ultra Recall:
Copy & Paste (the default behaviour is *link*)
Drag & Drop (while depressing the *Alt* key)

See Also:
- Internal Linking

3.3.1.5 Delete Info Items

There are multiple ways to **delete** existing Info Items in Ultra Recall (always based on the currently selected Info Items):

- Keyboard Shortcut: Hit the *Del* key
  Note: by default the Info Item will be moved into the Recycle Bin. To directly permanently delete, click Shift+Del instead
- Menu Bar*: Edit | Delete (hold the Shift key to permanently delete)*

3.3.2 Internal Linking

In addition to logically linking within the Data Explorer pane, internal links to other Info Items (in the same or other databases), including the cursor position in text items, can be added to the content of any Text item in an Ultra Recall Info Database by

1. Copying and pasting or dragging and dropping an item from the Data Explorer pane, Search pane, or Related Items pane into the text editor. *Note:* To create a link with anchor (that will restore the current cursor position), select *Copy Internal Link Anchor* on the Edit menu, or focus the Data Explorer pane and copy (Ctrl+C), then paste into the text editor of another item.
2. By linking via the Link/Move dialog while focus is in the details pane (if the related option is enabled).

Clicking on the internal link (or pressing the keyboard shortcut to open the link) will navigate to that item.

Notes:
- Internal links are not included in an item's parents as tracked by Ultra Recall.
- If the item an internal item is linked to is permanently deleted, the internal link will still remain but not work.
- Internal links require registration of the *ur* URL protocol, which is done by the installer but not the portable version.

See Also:
- Text Editor
- Logical Linking
- External Linking
- Info Item Attributes

3.3.3 Templates

Each Info Item in an Ultra Recall Info Database is based on a template Info Item.

The Template of an Info Item can be changed at any time to any other template in the same Template Group. New Templates can be created, and existing templates can be modified at any time.

The Template of each Info Item is viewable and editable as an Attribute in the Item Attributes Pane and can be searched.

All of these template features assist in organizing the information within Ultra Recall.

See Also:
- Organizing Information
- Search
- Template
- Template Groups
- Item Attributes Pane

3.3.4 Attributes

Each Info Item has several Attributes, some of which are automatically assigned and managed by Ultra Recall. The Attributes assigned by default to each Info Item is determined by its Template, but you can also assign other Attributes as well.

The existence and values of the Attributes assigned to Info Items is a powerful aspect of Ultra Recall. You can group Info Items with a search based on Attributes, sort them in the Related Items Pane, because it is a structured way to add information to your data.

See Also:
- Info Item
- Attributes
- Template
- Templates
- Search
- Searches
- Related Items Pane

3.3.5 Searches

Searches provide a way to locate and group Info Items on a wide range of criteria. After a search has been defined, it can be converted into a permanent Info Item, providing a way to immediately locate, group, and sort Info Items for a myriad of purposes.

Saved Searches can be saved either in the Search Pane or the Data Explorer Pane, where it can reside with the data it pertains to and searches.

See Also:
- Search
- Saved Searches
- Limited Searches
- Phrase Searches
- Search Pane
- Data Explorer Pane

3.4 Viewing Information

Ultra Recall provides convenient, modular access to your data in a variety of ways from several perspectives.

While the different components are always coordinated, this coordination differs depending on which **Selection Pane is active:**
- Normal Mode: when a regular Selection Pane is active (determining the selection), all Dependent Panes are refreshed to reflect the appropriate information about the selected Info Items.

- Internet Browser Mode: When the **Web Toolbar** is active (is populated), the Item Details Pane will display the content of the *URL*, but the other Dependent Panes will continue to reflect the appropriate information of the Selection Pane selection. The selection in the Selection Pane will be subdued but still visible indicating what is being displayed in the Dependent Panes.

See Also:
- Item Details Pane
- Internal Browser View
- Web Toolbar

·   Selection Panes
·   Dependent Panes

3.4.1   Normal Mode

In **Normal Mode**, either the Search Pane, Data Explorer Pane, or Related Items Pane have specified the selection, the Web Toolbar is empty, and the Dependent Panes are displaying information about the selection.

The Data Explorer Pane displays the title, flag and icon of each Info Item, along with the relationships between Info Items.

The Related Items Pane displays the icon, title, and other user selected Attribute values for either the child Info Items, or selected Info Items (or Search Results when viewing a search).

The Item Attributes Pane displays all Attribute values for the selected Info Items (when multiple Info Items are selected it only shows the Attributes common to them all and either the common value or a blank value).

The Item Parents Pane displays the title for each Info Item the selected Info Items are parented to.

The Item Notes Pane displays the notes assigned to an Info Item (disabled for multiple selection).

The Item Details Pane display the main data for the Info Item. Several different Viewers and Editors are displayed here for specialized content, including the Internal Browser View for many types of content including web content.

See Also:
·   Viewing Information
·   Internet Browser Mode

3.4.2   Internal Browser Mode

Ultra Recall can be used just like the internet browser you use today. Several components of the Ultra Recall application are used together to replicate and extend the typical functionality of an internet browser.

These include:
·   Web Toolbar
·   Internal Browser View
·   Status Bar

Info Items are analogous to favorites or bookmarks (but are much more powerful and flexible).   Direct entry of URLs is done in the Web Toolbar, with most of the same conveniences and some additional features provided. You can drag the icon next to any *URL* in the Web Toolbar directly into the Data Explorer Pane to create a new Info Item for any web content.

Depending on the user option configuration: *Browser | Launch shortcuts in external browser window by default*, web content will either be displayed internally in the Internal Browser View or in an external browser. If displayed internally, you can drag shortcuts, or text directly from the Item Details Pane to the Data Explorer Pane to create new Info Items for that content.

Regardless of the *Browser | Launch shortcuts in external browser window* option setting, URLs can always be viewed externally, using the following methods:
·   Web Toolbar: *Shift+Enter or Shift+Click (on the Go button)* when a URL is present
·   Internal Browser View: Shift+Ctrl+Q (with a link selected) or Ctrl+Q if no link is selected

---

See Also:
· Item Details Pane
· Editing Microsoft Office and PDF Documents Internally
· Browser Options

3.5   Recalling Information

The information organizational capabilities of Ultra Recall are unprecedented, but its ability to find the information back when you need it are unbelievable! The struggle retrieving your data when needed that you are accustomed to with existing data management applications is now a thing of the past.

You can now place ALL your information into an Ultra Recall Info Database with the confidence that is at your fingertips when needed.

Once you load your information into an Ultra Recall Info Database, the extensive Search capabilities in the application provide all you need to quickly and reliably find that information back when you need it. A Quick Search is typically adequate to find the Info Items you need, and a powerful Advanced Search is available to write sophisticated queries enabling you to accurately locate your information with pinpoint precision.

Any **Search** that you define can be easily saved for future use as a **Search** Info Item in either the Search Pane or the Data Explorer Pane.

See Also:
· Search
· Search Pane
· Quick Search
· Advanced Search
· Data Explorer Pane

3.5.1   Navigating

Because the Data Explorer Pane allows you to organize your information in a hierarchical way (with the added benefit of Logical Linking), you can often navigate using these relationships between Info Items to quickly find the information you are looking for.

The Data Explorer and Search Panes are the navigation center of Ultra Recall. They are where the relationships between Info Items are viewed and updated. New Info Items are created with them, related together with Logical Linking.

When Info Items are selected in a Selection Pane (such as the Data Explorer Pane), the other Panes are updated to reflect their respective information about the selected Info Items and can also be used for navigation purposes. The following lists the various supporting panes and how they can be used for navigation:
· Related Items Pane: this panes caption is updated to indicate what is being displayed, double-clicking or hitting Enter on a row will navigate to the indicated Info Item. This can be useful to navigate from Search Results, or to drill-down to children of the selected Info Item(s).
· Item Parents Pane: this pane displays the parent(s) of the selected Info Items, double-clicking or hitting Enter on a parent will navigate to it in the active Selection Pane.

See Also:
· Data Explorer Pane
· Search Pane
· Logical Linking
· Selection Pane
· Related Items Pane

- Item Parents Pane
- Link/Move/Copy Dialog
- Internal Linking
- Going to an Item

3.5.2   Searching

Searching is the process of locating the Info Item(s) that match a wide range of criteria that you specify.

Users are often interested in the Info Items that contain particular words. Quick Search is the simplest, fastest method to accomplish this type of search.

After a search completes, search results can be navigated using *Next Match* item on the Go menu and by viewing in the Search Results pane.

If you need to further refine your **search**, many sophisticated **search** options are available via the Advanced Search mode.

If no criteria is defined for a Quick Search, all the eligible Info Items for the **search** will be displayed in a flat list as the Search Results.

Note: Any currently executing **Search** can be halted with the *ESC* key, clicking the *Stop* button on the View Toolbar, or navigating to a different Info Item.

See Also:
- Quick Search
- Search Options
- Auto-generated keywords
- Advanced Search
- Saved Searches
- Limited Searches
- Searching only user-defined keywords
- Phrase Searches
- Whole Word Searches
- Locked Searches
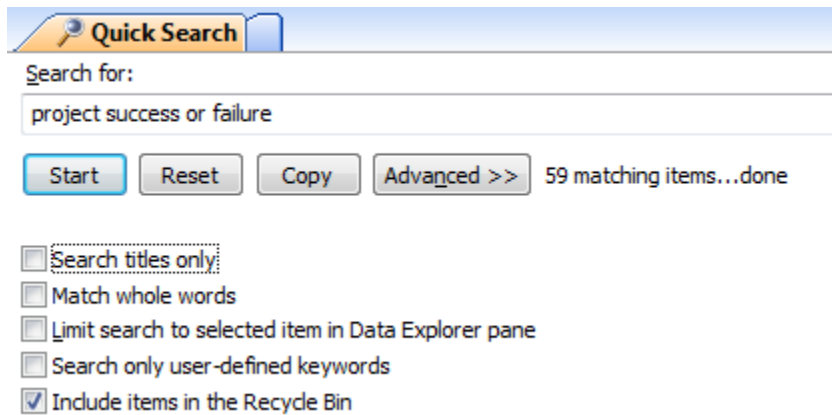- Virtual Attributes

3.5.2.1   Quick Search

The quickest way to search in Ultra Recall is **Quick Search**.

Ways to **Quick Search**:
- Type a word or words (or select a previous search phrase from the drop-down) in the Search combo of the View toolbar and press Enter to start the search (hold Control down to open the search in a new tab).
- Choose *Edit | Search* on the menu (or type Ctrl+Shift+F) to go to the Quick Search item and enter search text.

Any Info Item based on the Search Template is a **Search** Info Item. The **Quick Search** Info Item (in the Search Pane) is defined by default and cannot be deleted. You can use the *Ctrl-Shift+F* keyboard shortcut or the menu entry: *Edit | Find* to quickly navigate to this system Info Item.

Below is the Search Criteria Editor in **Quick Search** mode:

Quick Search options:
- **Contains Keywords search:** Enter one or more words to find all Info Items that contain all these words.
- **Phrase search**: Enter a phrase surrounded by double-quotes (i.e., "phrase to search") to perform an optimized phrase search.
- **Matches Wildcard search:** If the search criteria specified contains any of the Matches Wildcard characters (*?,*, [, ^, -, or]*), then a Matches Wildcard search will be executed.
- **OR boolean logic:** Enter one or more **OR** relationships in your criteria to specify **OR** boolean logic in a **Quick Search** (**OR** works the same as with an online Google search). Note: like Google, the **AND** relationship is implied and optional.
- **Search titles only:** Check the 'Search titles only' checkbox to search only item titles (if unchecked, all item Attributes and Keywords are searched).
- **Match whole words**
- **Limited Searches**

How to use a **Quick Search**:
- **Start:**
  1. **Automatically**: If the "Automatically start saved search when search item selected" Search Option checkbox is checked.
  2. **Manually (when you type)**: if the "Incremental search delay when typing is not 0, this search will restart after the specified delay as you enter search criteria.
  3. **Manually (with the *Start* button)**: clicking the *Start* button will always start searching based on the specified criteria (or restart if a search is running).
- **Stop**: A running search can be stopped by hitting *ESC*, the *Stop* button on the View Toolbar (or View submenu), or navigating to a different Info Item.
- **Reset**: The *Reset* button will stop the search (if running) and reset the search criteria.
- **Save**: The *Copy* button will create a new Saved Search from the current search.
- **Promote to Advanced Search**: the *Advanced >>* button will convert your Quick Search into an equivalent Advanced Search.

See also:
- Searching
- Advanced Search
- Or Boolean Logic
- Keywords
- Phrase Search
- Limited Searches
- Whole Word Searches
- Locked Searches
- Search Options

- Saved Searches
- Search Options
- View Toolbar
- Comparison Operators

3.5.2.2   Advanced Search

When a Quick Search isn't detailed enough to meet your needs, simply switch to the **Advanced Search** mode. This is done by clicking the *Advanced* button on the Search Criteria Editor. *

The image below shows a defined **Advanced Search** criteria (the default *Most Popular* **Search** Info Item):

The above **Advanced Search** contains three Criteria Rows. It also demonstrates several advanced features, including Criteria Relationships, Indenting, and Relative Dates. An advanced search can be further filtered by entering text in the Search for field.

How to use an **Advanced Search**:
- **Start:** clicking the *Start* button will always start searching based on the specified criteria (or restart if a search is running).
- **Reset**: The *Reset* button will stop the search (if running) and reset the search criteria.
- **Stop**: A running search can be stopped by hitting *ESC*, the *Stop* button on the View Toolbar (or View submenu), or navigating to a different Info Item.
- **Save**: The *Copy* button will create a new Saved Search from current search.
- **Demote to Quick Search**: the *Quick* << button will convert your **Advanced Search** into a Quick Search.

See Also:
- Searching
- Limited Searches
- Quick Search
- Phrase Searches
- Limited Search
- Whole Word Searches
- Locked Searches
- Saved Searches
- Comparison Operators

3.5.2.2.1 Criteria Grid

> The section of the Advanced Search where the criteria is entered is the **Search Criteria Grid**.

>

> Each row of data in the **Criteria Grid** is a Criteria Row.

> The rows are related to each other via Relationships, which are further defined using Indenting.

> **See Also:**
> - Advanced Search
> - Criteria Row
> - Relationships
> - Indenting

3.5.2.2.1.1 Criteria Row

> Each row in the Advanced Search grid is a separate **Criteria Row**.

> Each **Criteria Row** defines specific search criteria built with an Item/Attribute value, a Comparison operator and a Value (unless the Comparison doesn't use one).

> If more than one **Criteria Row** is specified, the relationship between each **Criteria Row** can be defined. Also, indenting is used to group **Criteria Rows**, which defines the precedence or order of execution when the Search is executed.

> **Add Criteria Row:** New **Criteria Rows** can be added to fully define your search. Several ways are available to add a new **Criteria Row**:
> Toolbar: When not in edit mode of the Criteria Grid, click the *Insert* button.
> Keyboard Shortcut: When not in edit mode of the Criteria Grid, click the *Insert* key.
> Mouse: Right click on a criteria row, then choose *Insert* from the menu.

> **Remove Criteria Row:** Criteria Rows can be removed when unneeded. Several ways are available to add a delete an existing **Criteria Row**:
> Toolbar: When not in edit mode of the Criteria Grid, click the *Delete* button.
> Keyboard Shortcut: When not in edit mode of the Criteria Grid, click the *Del* key.
> Mouse: Right click on a criteria row, then choose *Delete* from the menu.

> **Move Criteria Row:**
> Toolbar: Click the *Up* or *Down* buttons.
> Keyboard Shortcut: Press Ctrl+Shift+Up or Ctrl+Shift+Down.
> Mouse: Right click on a criteria row, then select *Move -> Up* or *Move -> Down* or select *Move Up* or *Move Down* on the Tree menu.

> **See Also:**
> - Criteria Grid
> - Item/Attribute
> - Comparison Operators
> - Value

Each Advanced Search Criteria Row defines a single search criteria that compares either each Info Item or a single Attribute of each Info Item with a Comparison operator (which may or may not require a value for the comparison). Either *(Item)* or a specified Attribute Name is selected for the **Item/Attribute** column value.

See Also:
- Criteria Row
- Not
- Comparison Operators
- Value

This checkbox allows you to invert the logic of the criteria row: ie, (Item) contains keywords 'xyz' becomes (Item) does not contain keywords 'xyz'.

See Also:
- Criteria Row
- Comparison Operators
- Value

Several different Advanced Search **Comparison Operators** are available to define your Search Criteria Row.

The **Comparison Operators** available are dependent on the selection in the Item/Attributes column of the Advanced Search criteria grid.

Item/Attribute column selection	Available Comparison Operators
(Item)	contains keywords
	does not contain keywords
	matches wildcard
	does not match wildcard
	is
	is not
	is child of
	is parent of
	is descendant of
	is ancestor of
Attribute Name	contains keywords†
	does not contain keywords†
	matches wildcard†
	does not match wildcard†
	exists*
	does not exist*
	equals
	does not equal
	less than
	less than or equal to
	greater than
	greater than or equal to

† indicates that this operator is only available for Attributes of type String
* indicates that no value is entered for this operator

See Also:
- Criteria Row
- Item/Attribute
- Not
- Value

- Contains Keywords
- Matches Wildcard
- Is
- Exists
- Equality
- Relational operators

The **Contains Keywords [Does Not Contain Keywords]** comparison operator locates Info Items or Info Items with the specified Attribute containing the specified keywords.

By default a Quick Search uses an *(Item)* Contains Keywords *<keywords entered>* type of search, but it is also possible to specify boolean OR logic, Phrase Searches, and Matches Wildcard search criteria from Quick Search as well.

Note: If you are searching for Info Items containing a word included in the Keyword Exclusions list, a Matches Wildcard operator can instead be used, which can be accomplished with an Advanced Search, or by using a wildcard symbol in your criteria (such as *) as mentioned above.

See Also:
- Quick Search
- Advanced Search
- Keywords
- Keyword Exclusions
- Matches Wildcard
- Is
- Exists
- Equality
- Relational

The **Matches Wildcard [Does Not Match Wildcard]** comparison operator locates Info Items or Info Items with the specified Attribute that match the specified **wildcard** expression.

The **wildcard** characters are the same as the typical command-line wildcards: ?, *, [], ^ and - characters.
- ? = matches any single character
- * = matches 0 or more characters
- [...] = match 1 character within the [ ] symbols
- [^...] = match 1 character that is NOT within the [ ] symbols following the ^ symbol
- - = can be used to specify a range within the [ ] symbols (ie. [a-z] will match any character in range between a and z

Notes:
- To match the ? and * characters as literals, use [?] and [*] respectively.
- To match literal [and] characters, enter [[or]].
- The **Matches Wildcard** operator is case-insensitive (A matches 'A' or 'a').

A Quick Search uses an *(Item)* Contains Keywords *<keywords entered>* type of criteria, unless one of the **wildcard** operators, or the " (double quote) symbol is included in the criteria, in which case a **Matches Wildcard** criteria will be used instead.

See Also:
- Quick Search
- Advanced Search
- Keyword Exclusions
- Contains Keywords

- Is
- Exists
- Equality
- Relational

The **Is [Is not]** comparison operator is only valid when the Item/Attribute column is set to *(Item)*. The **Is [Is not]** operator is the way to search for Info Items that are based on a particular template.

See Also:
- Advanced Search
- Matches Wildcard
- Comparison Operators
- Exists
- Equality
- Relational

The **Exists [does not Exist]** comparison operator is only valid when the Item/Attribute column is set to a *specified Attribute*. The **Exists [does not Exist]** operator is the way to search for Info Items that have (or do not have) the *specified Attribute* assigned.

Note: This operator does not use a Value and therefore when this operator is selected, the Value column is blanked out and disabled.

See Also:
- Advanced Search
- Matches Wildcard
- Comparison Operators
- Is
- Equality
- Relational

There are a number of **equality** comparison operators. They are only valid when the Item/Attribute column is set to a *specified Attribute*, and are used to compare the specified Attribute's value against the specified value you provide.

The **equality** operators include (and are self explanatory):
- equals
- does not equal
- less than
- less than or equal
- greater than
- greater than or equal

See Also:
- Advanced Search
- Matches Wildcard
- Comparison Operators
- Is
- Exists
- Relational

There are a number of **relational** comparison operators. They are only valid only valid when the Item/Attribute column is set to *(Item)* or an Info Item attribute type*.

The **relational** operators include:

- *is child of:* Finds all Info Items that are a child of the specified Info Item. For search items, finds all results of the search item.
- *is parent of*: Finds all Info Items that are a parent of the specified Info Item. For search items, finds all parents of search result items.
- *is descendant of*: Finds all Info Items that are a child or grandchild (at any level) of the specified Info Item. For search items, finds all children (at any level) of search result items.
- *is ancestor of*: Finds all Info Items that are a parent or grand parent (at any level) of the specified Info Item. For search items, finds all parents (at any level) of search result items.

Note: A nested search (a search invoking another search) is created if the Info Item specified as the *Value* is another search item and the operator is either *is child of* or *is descendant of*.

See Also:
- Advanced Search
- Matches Wildcard
- Comparison Operators
- Is
- Exists
- Equality
- Logical Linking
- Advanced Search sample

Note: Available in Professional edition only.

Most Comparison Operators compare the Item/Attribute specified with the value indicated specified in the **Value** column of the Criteria Grid. With most Operators an empty value matches *null* (missing) values.

See Also:
- Criteria Row
- Item/Attribute
- Comparison Operators
- Contains Keywords
- Matches Wildcard
- Is
- Equality

3.5.2.2.1.2 Search Relationships

Search Relationships define how Criteria Row are processed together. The default **search relationship** is the And relationship, but Or is also available.

In the following example, you can see the And and Or **relationships** used, along with indenting to define grouping between the Criteria Rows.

Relationship	Item/Attribute	Comparison	Value
	Date Accessed	greater than or equal to	9/22/2004
or	Date Modified	greater than or equal to	9/22/2004
└─and	ItemID	does not equal	1,000

The logic actually used by the above search: (Date Accessed >= '9/22/2004' OR Date Modified >= '9/22/2004') AND (ItemID <> 1000). See the section on Indenting for the details.

See Also:

- Criteria Grid
- Criteria Row
- And
- Or
- Indenting
- Search Expressions

The **And** relationship indicates that both the search expression before and after the **And** relationship must be met for an Info Item to match the specified criteria.

See Also:
- Search Relationships
- Search Indenting
- Or Relationship

The **Or** relationship indicates that only one of the Criteria Rows before and after the **Or** relationship must be met for the search to find an Info Item.

If **OR** is entered in a Quick Search, **Or** boolean logic will be used identically to an online Google search . If you switch the Quick Search to Advanced mode, you can view the exact **Or** logic that is actually used by the Quick Search containing one or more **OR**s. Note: **AND** is implied between words in a Quick Search (also the same as an online Google search) only **OR** needs to be entered when desired.

See Also:
- Search Relationships
- And Relationship
- Quick Search

3.5.2.2.1.3 Search Indenting

As advanced searches are used, multiple Criteria Rows can be defined. The precedence of the And and Or relationships will process AND'ed Criteria Rows first. Sometimes this is not the desired search behaviour. You can explicitly specify precedence using **Indenting**, which function like parentheses. All Criteria Rows at the same **indent level** (regardless of location) will be evaluated together as if they were enclosed in a parenthesis (comprising a composite Search Expression). The Relationship for the first Criteria Row in an **indent level** determines how the expression represented by that indent level is related to the rest of the search criteria.

Relationship	Item/Attribute	Comparison	Value
	Date Accessed	greater than or equal to	9/22/2004
or	Date Modified	greater than or equal to	9/22/2004
└─and	ItemID	does not equal	1,000

To **change** the indentation of a row in the criteria grid, select the row and choose *Tree | Move Right* or *Tree | Move Left* on the menu bar or Tree toolbar (default keyboard shortcuts are Ctrl+Shift+Right Arrow and Ctrl+Shift+Left Arrow) or select *Move -> Right* or *Move -> Left* on the right-click menu.

The logic actually used by the above search: (Date Accessed >= '*9/22/2004*' OR Date Modified >= '*9/22/2004*') AND (ItemID <> 1000). See the section on Indenting for the details.

Without using **indenting** to group the OR'ed rows together, the search would be executed differently than described above. The 2nd and 3rd Criteria Rows would have to be met or the 1st row could be

met independently. By indenting the 3rd row, the Search will group 1st and 2nd rows together and the 3rd row by itself. This explicitly defines the processing precedence allowing the user to define sophisticated searches with a graphical interface.

See Also:
- Criteria Grid
- Criteria Row
- Relationships

3.5.2.2.1.4 Search Expressions

Each Advanced Search Criteria Row represents a **Search Expression**. If Search Indenting is used, then the combined logic of all Criteria Rows at the indent level also comprise a composite **Search Expression**. In that case, the Search Relationship of the first Criteria Row at that Indent Level is the Search Relationship for that **Search Expression**.

AND'ed Search Expressions are evaluated first, followed by OR'ed expressions.
See Also:
- Search
- Advanced Search
- Search Criteria Grid
- Search Relationships
- Search Indenting

3.5.2.2.2 Relative Dates

The *Store dates relative to the current date* checkbox available to Advanced Searches allows you to specify dates that will remain a relative distance from the current date.

As an example, assume today's date is 10/1/2004 and you specify a Criteria Row date Value of 9/15/2004 (which is 15 days prior to today's date of 10/1/2004). If you check the *Store dates relative to the current date* checkbox, the search Value will be stored not as the absolute value of 9/15/2004 but rather will compute a date 15 days prior to the current date whenever the Search is executed.

This feature enables you to create searches like the default Saved Search named *Recently Viewed*.

See Also:
- Advanced Search

3.5.2.3   Saved Searches

Any defined Search (whether Quick or Advanced) can be saved in the Search or Data Explorer pane for future use. This is done by clicking the *Copy* button on a Search item, via copy/paste or drag/drop, or by inserting a new Search item.

When a Search is copied, a new Search Info item is created as a child of the *My Searches* system Info Item, in the Search Pane. Once the Search Info Item is saved, you can move or copy it anywhere in the Ultra Recall Info Database.

See Also:
- Advanced Search
- Limited Search
- Data Explorer Pane
- Search Pane
- Limited Searches
- Nested Searches

- Phrase Search
- Locked Searches

3.5.2.4   Whole Word Searches

If the **Match whole words** checkbox is checked, for both Quick Search and Advanced Searches, all string search terms must match the entire word. If unchecked, the match will be on whole words or part of a word (for instance, a search term of **test** would match **test**, **testing**, **contest**, etc.).

See Also:
- Advanced Search
- Limited Search
- Search Pane
- Limited Searches
- Nested Searches
- Phrase Search
- Locked Searches

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3.5.2.5   Limited Searches

Both Quick Search and Advanced Searches can be used to only search a subset of the data in an Info Database. The way to do this varies slightly based on where the **Search** Info Item in use is located:
- Search Pane: by checking the *Limit search to selected item in Data Explorer pane* checkbox
- Data Explorer Pane: by checking the *Limit search to siblings of current search item* checkbox

Note: The *Include items in the Recycle Bin* box works in a similar manner. When this box is not checked (the default), Info Items in the Recycle Bin are not searched, when checked the Info Items in the Recycle Bin are included in Search results.

See Also:
- Quick Search
- Advanced Search
- Data Explorer Pane
- Search Pane
- Nested Searches
- Phrase Search
- Locked Searches

3.5.2.6   Nested Searches

Nested Searches allow one search to leverage another existing saved search, providing a flexible way to create powerful searches based on hierarchy using the Relational comparison operators.

A single search is designed to find Info Items that match the defined criteria (for instance, projects that were created on or before a certain date and/or have a particular attribute and/or containing certain keywords, etc.). But all of this criteria only define characteristics of items themselves (projects in the case). What if you want to find projects that have (or don't have) Tasks that are not completed or Appointments that are in the future? **Nested Searches** using the Relational criteria operators are the key.

The *Projects to Advance* Saved Search in the *GTD.urd* sample and the *Nested Searches* search items in the *Advanced Search.urd* sample demonstrate practical uses of nested searches.

See Also:

- Relational Operators
- Quick Search
- Advanced Search
- Data Explorer Pane
- Search Pane
- Limited Searches
- Phrase Search
- Locked Searches

Note: Available in Professional edition only.

3.5.2.7   Search only User-defined Keywords

Both Quick Search and Advanced Searches for keywords can be limited to just user-defined keywords by checking this option (if unchecked, user-defined and auto-generated keywords will be searched).

See Also:
- Quick Search
- Advanced Search
- User-defined keywords
- Auto-generated keywords
- Limited Searches
- Nested Searches
- Phrase Search
- Locked Searches

3.5.2.8   Phrase Search

Ultra Recall stores the text of every Info Item (including linked/stored documents) for fast Info Item recall.

Full-Text Search Enhancements *Enabled*

If full-text search enhancements are **enabled**, full phrase searching is supported by surrounding the phrase "in double quotes." The following search features are also available:
1. The NOT prefix can be used to exclude items containing specific words.
2. NEAR can be used to find two words near each other.
3. Parentheses are supported for complex search expressions.
4. A Relevance attribute is also available for display in the Search Results pane.

Note: AND, OR, NOT, and NEAR must be capitalized to be treated as logical operators.

Full-Text Search Enhancements *Disabled*

If full-text search enhancements are **disabled**, the index does not fully accommodate true Phrase Searching since it doesn't record the position or count of the keywords stored. Most **phrase searches** are optimized by first searching the keyword index. The main exception is searching for symbols (or numbers when not keywording digits), which requires an **Extended Phrase Search**.

- **Optimized Phrase Search (normal)**: Either a Quick Search or an Advanced *(Item)* Contains Keywords Search with a double-quoted criteria will perform a phrase search (i.e., "my phrase here"). *Note: If the specified criteria contains no keywordable text (such as a numeric criteria when digits are not being keyworded), then a partial Phrase Search will be executed - only attribute values and user-defined keywords will be searched for the phrase.*

- **Extended Phrase Search (less efficient but comprehensive)**: If the criteria you enter would not be keyworded by Ultra Recall (mostly symbols or digits when numbers are not being keyworded) or you have items which are not keyworded, an Extended Phrase Search is required to accomplish a true phrase search. Use these steps to define and execute an **Extended Phrase Search**:
    1. Switch to an Advanced Search
    2. Enter a criteria of <u>Item Text</u> <u>Matches Wildcard</u> **phrase to search**
    3. Add additional criteria rows as desired (to further refine your search)
    4. Click on *Start* (you can cancel the search via the *Esc* key or the *Stop* button on the View Toolbar)

Note: This search can be fairly slow since each Item will be re-parsed for the underlying plain text and then phrase searched individually - performance can be enhanced by limiting the items searched with a Limited Search.

Note: **Phrase Searching** is not available in the Viewer version of Ultra Recall with full-text search enhancements **disabled**.

See Also:
- Advanced Search
- Limited Search
- Quick Search
- Nested Searches
- Locked Searches
- Searching
- Keywords

3.5.2.9   Locked Searches

Both Quick Search and Advanced Searches can be locked to prevent accidental changes to the search by checking the *Item | Lock* menu item.

See Also:
- Advanced Search
- Limited Search
- Quick Search
- Nested Searches
- Phrase Search
- Searching
- Keywords

3.6   Managing Documents and Files

Ultra Recall is a great place to store and/or manage your local and remote files. Every supported file type is automatically processed for text, attribute values, and optionally stores the actual file within the Ultra Recall Info Database.

Many features are provided to manage these documents, files and folders, and interact with all Info Items with external applications, such as:
- Drag and Copy From Ultra Recall
- Synchronize
- Outlook Synchronization
- Folder Synchronization
- Refresh
- Store Contents
- Copy Page Shortcut
- Open Document

- Open Shortcut
- Show Explorer Menu
- Document Summary Attributes
- Editing Web Pages Internally
- Editing Microsoft Office and PDF Documents Internally
- Editing Stored Documents Externally

See Also:
- Document Template

3.6.1 Drag/Copy From Ultra Recall

Ultra Recall provides seamless integration with other Windows applications via drag/drop and copy/paste. One or more Info Items can be dragged and dropped or copied and pasted from the Data Explorer pane, Search pane, or Related Items pane into Windows applications that can accept files, such as Windows Explorer, Outlook Express, Windows Mail, Windows Live Mail, Outlook, etc. For Text items, the item rich text will be copied; for Document items, the stored or linked document will be copied to the destination application.

See Also:
- Export
- Documents

3.6.2 Synchronize

Any Info Item can reference an external document or folder with the *URL* attribute. If a valid *URL* is specified, the information for the document in Ultra Recall can be **Synchronized** with this external document or folder (including the actual file if the contents are stored).

What Synchronization Is

Any Info Item which has a *URL* attribute populated with a valid URL to a local file/folder or Outlook object can be **Synchronized** with the referenced object (by choosing *Item | Synchronize* on the menu bar), which could be a web page, a local file or folder, or an Outlook object or folder. You can easily create Info Items referencing these external files and objects using a variety of methods, including drag & drop, copy & paste, the Import Wizard or direct entry of a *URL* value. The Info Item and the referenced external "object" can be considered a "matched pair." At the time of import, the two are in sync with each other. Once one of the matched pair is modified, they are no longer in "sync," and the one last modified is the "newest" or "current" object.

Synchronizing Info Items in Ultra Recall is the process of reconciling these "matched pairs" so they are again in **sync** with each other. This includes updating any text, relevant attribute values, and optionally the stored content of the Info Item. The "newest" or "current" object in the pair is used to update the other.

In other words, if the object referenced by an Info Item's *URL* attribute has been updated more recently, when that Info Item is **synced**, the Info Item will be updated (re-imported) into Ultra Recall to match the changes. If the Info Item itself has last been updated, the changes made in Ultra Recall will be made (if possible) to the external object referenced by the Info Item's *URL* attribute. Local files and folders and Outlook objects such as *Appointments*, *Contacts*, *Tasks* and *Emails* are fully supported for **Synchronization**.

For Search Info Items, the URL attribute must reference a local or Outlook folder and the process is unidirectional. See Search Synchronization for more details.

The Criteria Used

The *Modified* date of Info Items and external objects is used by Ultra Recall to determine which is "newest" or "current." Each Info Item with a *URL* attribute and the object referenced by the value is "matched pair." The object with the latest *Modified* date is considered "current" and is used as the "master" for the **Synchronization** process (the other is updated from this "master").

Synchronizing an Info Item with a URL attribute value of a local or Outlook **folder** will do the **Synchronization** process described above for children Info Items and the external folder's items that have not yet been imported in Ultra Recall. The default import options set is used for this **Sync** process, with the exception of the *Create logically linked items for duplicate URLs* import option, which will always be used when a folder is **Synchronized**, regardless of the how the option is configured.

Synchronizing new Ultra Recall Info Items (no matched external object)

When an Info Item without a populated *URL* attribute is **Synchronized**, if it is a child of an Info Item containing a valid local or Outlook folder URL, the Info Item will be created in this external folder. In all other cases, the existing content and attributes are simply re-parsed for keywords.

Note: When Info Items linked to Outlook objects or local files are permanently **Deleted** using *Shift+Del* or *Ctrl+Shift+Del*, the corresponding external objects are also deleted to the Outlook "Deleted Items folder" / Windows Explorer "Recycle Bin" respectively. This provides an easy way to completely remove Info Item(s) and their related external object(s) in a single step from within Ultra Recall. *If the Info Item(s) are first deleted to the Ultra Recall Recycle Bin, permanently deleting the Info Item(s) will NOT delete the corresponding external files/objects.*

Ways to access:
Keyboard Shortcut**:** *Ctrl+F5*
Menu Bar: *Item | Synchronize*

See Also:
- Store Contents
- Refresh
- Documents
- Folder Synchronization
- Outlook Synchronization
- Search Synchronization
- Grids Option Dialog
- Keywords
- Auto-generated keyword
- Import Options

3.6.3   Folder Synchronization

When a folder from Windows Explorer is imported into Ultra Recall, all of its subfolders and files can be imported (by default maintaining their original directory structure) with the Import Wizard by using the Folder option.

If files or folders are later added to the Windows folder or are modified either in Ultra Recall or externally, you can easily **re-synchronize** these new/updated files and folders by Synchronizing the folder using *Item | Synchronize* on the menu bar. If you only want to add any new external files and/or folders, simply re-import the same root folder to the same location in the Data Explorer Pane with the *Create logically linked items for duplicate URLs* checkbox is checked. You can either check this option on the Select Destination page of the Import Wizard each time you import, or you can configure this to be the global default at *Tools | Options | Import (more)*.

You can also directly assign a *URL* attribute with a folder url to any existing Info Item, then Synchronize

the Info item to link or store the contents (including subfolders if you have the *Include subfolders when importing or syncing folders* checkbox checked, found at *Tools | Options | Import (more)* <tab>). The steps to add a *URL* attribute to an existing Info Item are found here.

Note: For files located in the same folder or a subfolder of the .urd file, when imported or synchronized, the path will be stored in the URL attribute as a relative path (relative to the location of the .urd file), allowing the .urd file and synchronized files to be relocated to different paths or drives intact.

Similar Synchronize functionality is provided for Outlook folders and objects.

See Also:
- Synchronize
- Outlook Synchronization
- Import (more) options
- Import Wizard
- Select Import Destination
- Import Folder
- Attributes
- Auto Attributes
- Data Explorer Pane
- Logical Linking
- Store or Link to external objects
- Stored Contents

Note: Available in Professional edition only.

3.6.4   Outlook Synchronization

Ultra Recall tightly integrates with Microsoft Outlook, storing or linking folders, emails, contacts, appointments, and tasks to and from Outlook.

Robust 2-way synchronization between Ultra Recall and Outlook is provided, which allows creating or editing objects in either application, then automatically synchronizing the changes in either direction. With this feature, you can take full advantage of the extensive features of Ultra Recall, while continuing to use Outlook as your email client and as a conduit for transferring Ultra Recall data to and from your cell phone or other mobile device.

Outlook folders: Outlook folders (such as *Contacts*, *Tasks*, or *Inbox*) can be imported into Ultra Recall, and the contents of the folder will also be imported (linked or stored as specified). If an Info Item for an Outlook Folder is later Synchronized (using *Item | Synchronize* on the menu bar), any new Info Items parented to the folder are created under this folder in Outlook (or vice versa) and existing child Info Items are synchronized with their Outlook counterparts. See the Synchronize topic for more details on this process.

Individual Outlook items: Individual Outlook objects can be linked or stored in Ultra Recall using the methods described under the Microsoft Outlook Integration section. They can then be edited either in Ultra Recall or Outlook, and Synced from within Ultra Recall to ensure both reflect the latest changes. When an Outlook folder is imported into Ultra Recall, the folder's object are also imported as child Info Items.

Note: The **Outlook sample** demonstrates how to use Outlook synchronization.

See Also:
- Samples
- Synchronize
- Search Synchronization

- Outlook Integration
- Outlook "field" mapping
- Data Explorer Pane
- Stored Contents

Note: Available in Professional edition only. The 64-bit edition of Outlook is not supported.

3.6.5   Search Synchronization

Folder Synchronization and Outlook Synchronization provide mechanisms to synchronize folders of files or objects in Ultra Recall. This allows you to link a folder, such as your Outlook Inbox or the My Documents folder, within Ultra Recall and periodically synchronize. Since the synchronization is two-way, changes made either in Ultra Recall or Outlook are handled, allowing you to make changes in either application.

Another method of Synchronization is **Search Synchronization**, which provides uni-directional synchronization (from Ultra Recall only). This allows you to organize Info Items as desired within Ultra Recall, yet synchronize them to a single external location (such as your Outlook Calendar or a local folder). You can use a combination of Folder/Outlook Synchronization and **Search Synchronization** to best meet your specific needs.

Search Synchronization works very similar to Folder and Outlook Sync, except that the *URL* attribute of a search must reference a local folder or Outlook folder (respectively). When the Search item is synced, the search is executed and the items located by the search are synchronized to the folder location specified by the Search Item's URL attribute.

Note that if an Info Item listed in the search results already has a valid, populated *URL* attribute value, the Info Item will be synced to this existing location and not to the location specified by the Search Info Item's *URL* attribute. To export the search results to a specific location, instead use the Export Wizard .

See Also:
- Synchronize
- Folder Synchronization
- Outlook Synchronization
- Explorer/Internet Explorer Integration
- Microsoft Outlook Integration
- Export Wizard

3.6.6   Refresh

Whenever the selection changes in a Selection Pane, the Dependent Panes are updated to reflect the appropriate detail information. If the user navigates via the Web Toolbar or a hyperlink in the Item Details Pane, the Item Details Pane will display the new URL content and not the content of the selected Info Item.

Clicking **Refresh** updates all the Dependent Panes (including the Item Details Pane) to the current selection in the Selection Panes.

Ways to access:
Keyboard Shortcut**:** *F5*
Menu Bar: *View | Refresh*

Note: holding *Shift* + either of the **Refresh** methods above will result in the entire Ultra Recall application reloading from the underlying Info Database. This can be used to update the display for any changes made by other users, or if for some reason what is displayed becomes invalid.

See Also:
- Store Contents
- Synchronize

3.6.7 Copy Page Shortcut

Whenever the Item Details Pane is displaying content with the Internal Browser View, the related *URL* can be placed on the clipboard using **Copy Page Shortcut**.

Ways to access:
Keyboard Shortcut**:** *Ctrl+Shift+C*
Menu Bar: *Item | Copy Page Shortcut*

3.6.8 Open Document

Info Items (including Text and derived Info Items) can be opened externally using **Open Document**. If the Info Item contains a stored document or content, **Open Document** will launch the stored content, otherwise the linked document will be opened.
Note: Holding Shift when using Open Document will force the linked document to be opened if available.

Ways to access:
Keyboard Shortcut**:** *Ctrl+J or Ctrl+Shift+J (force link document open)*
Menu Bar: *Item | Open Document*
Item Details Pane: *Click here to open stored document* hyperlink (displayed when the content can't be viewed internally)

See Also:
- Managing Documents and Files
- Editing Stored Documents Externally
- Options Dialog
- Item Details Pane

3.6.9 Open Shortcut

Any time a *URL* or *filename* is selected, the **Open Shortcut** method will launch the document. If the *Options | Browser | Launch shortcuts in external browser window by default* checkbox is checked, the shortcut will always launch externally to Ultra Recall, otherwise it will be launched in the appropriate Item Details viewer.

The *URL* can be selected in the *URL* Attribute in the Item Attributes Pane, rich text in the Item Details Pane or Item Notes Pane, within html being displayed in the Internal Browser View, etc.

Ways to access:
Keyboard Shortcut**:** *Ctrl+Q*
Menu Bar: *Item | Open Shortcut*

See Also:
- Browser Dialog

3.6.10 Show Explorer Menu

Show the Windows Explorer context menu for the selected Info Item. If the Info Item contains stored content (or is not based on the Document Template Group) the menu will be displayed for the stored copy (otherwise it will display the menu for the linked copy).
*Note: Holding Shift when using **Show Explorer Menu** will show the menu for the linked document if available.*

Ways to access:
Keyboard Shortcut**:** *Ctrl+E or Ctrl+Shift+E (force use of linked document)*
Menu Bar: *Item | Show Explorer Menu*

3.6.11 Stored Document Templates

You can store the contents of documents within an Ultra Recall Info Database. You can easily copy or move an existing document into Ultra Recall for storage using Drag & Drop or Copy and Paste.

You can also create stored documents directly in Ultra Recall by first creating a template for each desired document type. The following steps can be used to create such a template:
1.   Using the associated application (such as Microsoft Word for Word Documents), create and save an empty document (for text files, enter a single space into the file).
2.   Move this file from Windows Explorer into the Info Database as a child of the *Templates* system Info Item (which will turn it into a template). Make sure the document is stored in the database.
3.   Rename the template appropriately (for a Word Doc Template you might call it *Word Document*).
4.   Give the *Item Title* Attribute (the default name of new Info Items based on this template) an appropriate value (such as *New Word Doc*).
5.   Change the *URL* Attribute value to just the extension for this file type (such as *.doc*). The extension is needed to determine the extension to assign when this stored file is created locally for editing/viewing. Using the extension only will ensure that Info Items created from this template will <u>not</u> reference any external file (if it referencing an existing external file and you synchronized the Info Item, the Info Item would be updated to the contents of this external file).
6.   Ensure that the file's extension is added to the *File extensions to open stored documents writeable* option.

The resulting template can now be used to create new Info Items:
· Use the *Tree | Insert* menu
or
· Set the parent item's *Default Child Template* attribute and then use *Edit | Insert*.

See Also:
·   Templates
·   Document Template
·   Derived Templates
·   Stored Contents
·   Attributes
·   Synchronize
·   Document Summary sample

3.6.12 Document Summary Attributes

Many documents, such as Microsoft Office documents, digital camera picture files, music files, etc., contain summary info that can be useful in better identifying or locating a file at a later time. This information is stored for a document by Windows in a manner similar to Info Item Attributes (a name, type and value).

Ultra Recall provides access to this document summary information in two ways:
· Automatically keywords valid string information contained in any document summary property.
· Adds Info Item Attributes for any document summary property that has a name which matches the name of an Attribute defined in Ultra Recall (case-sensitive match).

Note: This functionality can be disabled by unchecking the box *Map Explorer summary properties to existing Ultra Recall attributes.*

See Also:
· Import (More) Dialog
· Document Summary Information
· Attributes

Note: Available in Professional edition only.

3.6.13 Editing Web Pages Internally

Web pages that have been imported into Ultra Recall can be edited, as well as viewed, within Ultra Recall:
1. Ensure that *.htm;.html;.mht* is included in the *File extensions to display in internal browser view* file extension list in Browser Options.
2. Ensure that *.htm;.html;.mht* is also included in the *File extensions to open stored documents writeable* file extension list in Document Options.

Note: You may need to restart Ultra Recall after updating these options. Linked web pages must be non-read-only in order to edit internally, and only local files (not pages on web sites) can be edited within Ultra Recall.

To edit a stored or linked web page item internally, select it and choose *Item | Edit Web Page* on the menu bar or enable the option for automatic editing of web pages. While editing, elements on the web page can be selected, deleted, moved, text can be formatted, styled, bulleted, colored, typed, etc., using the Format Toolbar and Format menu bar. To exit edit mode, choose *View | Refresh* on the menu.

See Also:
· Format Toolbar
· Browser Options
· Document Options
· Item Details Pane
· Internal Browser View

3.6.14 Editing Microsoft Office and PDF Documents Internally

Microsoft Office and **PDF** documents are not displayed or editable within Ultra Recall by default and are edited externally using Open Document. If *Word, Excel, Powerpoint, Adobe Acrobat Reader,* or *Foxit Reader* are installed, you have the option of using these applications within Ultra Recall to view and/or edit the respective file types, using the following steps:
1. Add the document extension (i.e., *.doc;.xls;.ppt;.pdf*) to the *File extensions to display in internal browser view:* file extension list in Browser Options. For Office 2007+ XML document formats (i.e., *.docx;.xlsx;.pptx*), enter *.zip* in this file extension list (and to prevent regular *.zip* files from being displayed in the internal browser, add *.zip* to the *File extensions to edit/view externally* option in Document Options).
2. If the document needs to be editable, ensure the extension is also added to the *File extensions to open stored documents writable:* file extension list in Document Options.

RTF documents and Text (and derived Info Item) editing
If *Microsoft Word* is installed, you can also use *Word* within Ultra Recall instead of the default Rich Text Editor to gain access to additional rich text formatting features. Simply add *.rtf* to the *File extensions to display in internal browser view:* file extension list in Browser Options.

Note: If Office or RTF documents still open externally when selected in UR, you may also need to configure Windows/Office to open documents in the same window.

See Also:
· Rich Text

- Rich Text Viewer
- Browser Options
- Document Options
- Item Details Pane
- Internal Browser View
- Editing Stored Documents Externally
- Open Document

3.6.15　Editing Stored Documents Externally

All Info Items can be edited outside of Ultra Recall. When an Info Item containing stored content is **edited externally**, the document is saved in a temporary file and updated in Ultra Recall after being modified. For each file type to be modified externally, add the file extension (*.rtf* for rich text items) to the *File extensions to open stored documents writeable* list on the Documents tab of the Options Dialog.

Click *Item | Open Document* on the menu, or *Item | Show Explorer Menu -> Open With* to begin external editing of a stored item.

The temporary document will be opened in its associated application (or the application specified for Open With). Rich Text items will be launched in the application associated with the *.rtf* extension (typically WordPad or Word). While an editor is available for Rich Text Info Items in Ultra Recall, external editing provides a way to use RTF features that the Ultra Recall rich text editor does not support.

After making changes to the temporary file in the external application, save the changes and/or exit the application. The changes will automatically* be updated in Ultra Recall at the following times (Ultra Recall will check the modified date of the temporary file copy at the following times and update the stored contents in Ultra Recall if it has changed):
1.　If the item is edited internally again by clicking *Click here to resume internal editing* in the Detail pane or *Item | Edit Internally* on the menu.
2.　When the item is saved via *File | Save* (Ctrl+S default shortcut) or is auto-saved.
3.　Navigating to a different Info Item in a Selection Pane.
4.　When selecting *Tools | Save All External Documents* on the menu bar (changes to all externally modified files are updated in Ultra Recall).
5.　Closing a database or exiting Ultra Recall.

Note: All temporary files created by Ultra Recall are automatically deleted when Ultra Recall exits.

* Ultra Recall will first prompt the user when this update occurs depending on the setting of the Prompt before updating from local copy of stored document checkbox on the Document tab of the user options .

Warning: "Temporary file cleaner" applications can interfere with editing of stored content if the created temporary files are deleted before Ultra Recall persists the changes back to the related Info Item. These temporary files must not be deleted while Ultra Recall is running, or you could lose any editing you have done on them. It is recommended that these type of applications be configured to only delete temporary files at Windows startup to prevent this type of conflict.

See Also:
- Open Document
- Stored Documents
- Options Dialog
- Document Dialog
- Selection Pane

- Navigating
- Document Template
- Text Template
- Derived Templates
- Editing internally with Microsoft Office apps & Adobe Acrobat

3.6.15.1 Recover changes after system crash

As outlined in the Editing Stored Documents Externally topic, editing stored content externally creates a temporary file for an external application to edit, which is later used by Ultra Recall to update its stored copy of the file. Ultra Recall does not maintain the "linkage" between the Info Item and the created temporary file after Ultra Recall is exited (either normally or abnormally, such as after Windows crashes).

In the event that Ultra Recall is abnormally terminated while stored content was being edited externally, the following procedure should be used to recover the externally edited changes into Ultra Recall:
1. Restart Windows
2. Restart Ultra Recall
3. Open all Info Databases (simultaneously) that had Info Items being externally edited at the time of the unexpected termination
4. Navigate to each Info Item that was being edited, begin external editing of the each Info Item, then close the external application.

Continue step #4 for all appropriate Info Items, as you navigate each the Info Item will be updated from the previously edited temporary file for that Info Item.

Warning: Ultra Recall deletes all temporary files created when the last instance of Ultra Recall is normally terminated. You must follow the above procedure before you exit Ultra Recall after initially restarting it, or the modified temporary files will be deleted.

See Also:
- Editing Stored Documents Externally

3.6.16 Windows Explorer Mode

The Internal Browser View will display Windows Explorer to display files in the following situations:
- **ZIP file contents** *(Windows XP and later only):*
1. when a Document Info Item for a *.zip* file is selected and *.zip* is in the *File Extensions to display in internal browser view:* extension list on the Browser Options dialog, the contents of the ZIP file will be displayed

- **Local folder contents**
1. the path to a valid local folder is entered in the Web Toolbar
2. when a *Folder* or other non-document Info Item with an assigned *URL* attribute (containing a valid local folder path) is selected and **folder* is in the *File extensions to display in internal browser view:* extension list on the Browser Options dialog, the folder contents will be displayed

Note: the Explorer view used by the Internal Browser View is configurable with the *Explorer view mode:* combo on the Browser Options dialog.

See Also:
- Internal Browser View
- Templates
- Browser Options
- Web Toolbar

3.6.17 Icon Management

Ultra Recall will retrieve the **icon** associated with every document or web page (if available) retrieved. When an **Icon** is retrieved, it is added to the list of **Icons** stored in that Info Database and can be assigned to other Info Items as well.

When the last Info Item referencing an **Icon** is either Deleted or assigned a different **Icon**, that unreferenced **Icon** will be removed from the Info Database.

To add a new **Icon** to the list of **Icons** available in an Info Database, simply link or store the *.ico* file for the **Icon** you want to make available.

3.7   Printing

Ultra Recall provides several **print/print preview** options. The actual choices available depend on how many Info Items are selected.
- Print/Print Preview Single Info Item
- Print/Print Preview Multiple Info Items

See Also:
- Exporting
- Copy and Paste
- Drag and Drop

3.7.1   Print/Print Preview a Single Info Item

Several **print/print preview** options exist when a single Info Item is selected:
- Item Details: this option will print the current contents of the Item Details Pane. This option is automatically selected when printing with focus is in the Item Details pane.
- Item Attributes: this option will print the current contents of the Item Attributes Pane
- Item Notes: this option will print the current contents of the Item Notes Pane
- Item Parents: this option will print the current contents of the Item Parents Pane
- Related Items grid: this option will print the current contents of the Related Items Pane
- Data Explorer tree: this option will print the current contents of the Data Explorer Pane
- Search tree: this option will print the current contents of the Search Pane

See Also:
- Printing
- Print Preview

3.7.1.1 Item Details

Choosing this print option will print the contents of the Item Details Pane.

A different print/print preview system will be displayed, depending on what type of Info Item is selected.
- Text, rich text documents and non-document Info Items will print with the internal Print Preview system.
- Web Page Info Items will print with the Internet Explorer Print/Print Preview system.*
- Other Document Info Items (such as Microsoft Word or Powerpoint) will print with the application associated with the Info Item's file extension.

See Also:
- Print/Print Preview a Single Info Item
- Multiple Selection

- Export
- Item Details Pane

3.7.1.2 Item Attributes

Choosing the **Item Attributes** print option will print the contents of the Item Attributes Pane (identical to what is being currently displayed in that pane).

See Also:
- Print/Print Preview a Single Info Item
- Printing
- Print Preview

3.7.1.3 Item Notes

Choosing the **Item Notes** print option will print the contents of the Item Notes Pane (identical to what is being currently displayed in that pane).

See Also:
- Print/Print Preview a Single Info Item
- Printing
- Print Preview

3.7.1.4 Item Parents

Choosing the **Item Parents** print option will print the contents of the Item Parents Pane (identical to what is being currently displayed in that pane).

See Also:
- Print/Print Preview a Single Info Item
- Printing
- Print Preview

3.7.1.5 Related Item grid

Choosing the **Related Item grid** print option will print the contents of the Related Items Pane (identical to what is being currently displayed in that pane).

See Also:
- Print/Print Preview a Single Info Item
- Printing
- Print Preview

3.7.1.6 Data Explorer tree

Choosing the **Data Explorer tree** print option will print the contents of the Data Explorer Pane (identical to what is being currently displayed in that pane).

See Also:
- Print/Print Preview a Single Info Item
- Printing
- Print Preview

3.7.1.7   Search tree

Choosing the **Search grid** print option will print the contents of the Search Pane (identical to what is being currently displayed in that pane).

See Also:
- Print/Print Preview a Single Info Item
- Printing
- Print Preview

3.7.2   Print/Print Preview Multiple Info Items

When selecting multiple Info Items and printing or previewing, the text for all selected Info Items will be combined and printed/previewed, with each item on a new page.

Note: To print all children of an Info Item will require expanding the parent(s) and multi-selecting the children Info Items as well.

See Also:
- Printing
- Print/Print Preview a Single Info Item
- Print Preview
- Editor Options

Note: Available in Professional edition only.

3.8   Exporting

Information stored in an Info Database can be exported in a variety of formats, including:
- Individual files to a folder
- HTML files
- A single CSV text file containing a comma-separated list of attribute values
- An XML file
- Text items combined as a single RTF file

This functionality is provided by the Export Dialog, which utilizes a convenient wizard interface.

See Also:
- Export Dialog

3.8.1   Exporting to HTML

Ultra Recall Info Items can be exported to HTML format.

To export Ultra Recall data to HTML:
- Select the items to export
- Start the Export Wizard (*File | Export* on the menu)
- Select *Documents and rich text items to HTML* as the Output Type
- Enter or browse to a folder to export to
- Click the *Finish* button

Notes:
- Advanced HTML export options are also available using XML export format.
- Only stored web page and rich text items are converted to HTML. All other document types (PDF,

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text, Word, Excel, etc.) will be exported in their original format.
· HTML export is available in the Professional edition only.

See Also:
· Export Wizard

3.8.2   Exporting to CSV

One of the export formats provided in Ultra Recall is CSV File. You can export to a CSV file using the Export Wizard, or from the Related Items Pane using the Copy Grid Values command. More detail about each method is described below.

Using the Export Wizard: the Export Wizard allows you to export some or all of the attribute values for the Info Items as currently specified by the Selection Pane.

From the Related Items Pane using the Copy Grid Values command: The Related Items Pane displays Info Item attribute values in a grid, with each row representing an Info Item, each column contains an attribute's value for that Info Item. In this pane you can select the desired attributes (columns) for display, sorting them as desired. Using the **Copy Grid Values** command (available on the Item menu, by right-clicking a cell in the pane, or with a keyboard shortcut [the default is *Ctrl+Shift+C]*). The data will be placed on the clipboard tab-delimited, which can then be pasted into a spreadsheet application or any program accepting tabular data.

See Also:
· Export Wizard
· Delimited Text files (CSV)
· Related Items Pane
· Item Menu
· Copy and pasting to other applications

3.8.3   Exporting to XML

One of the export options provided in Ultra Recall is XML export. The actual type of data exported is OML (or OPML).

The information that can be exported to OML includes:
· All attribute values and meta data
· Assigned icon
· Assigned flag
· Logical Linkage hierarchy
· Stored or linked documents (reference in the xml to the exported file in a subfolder)
· Item Notes (saved in the same manner as stored documents)

Steps to export all Ultra Recall data to XML (OML):
· Start the Export Wizard
· Select *Items to an XML (OML) file* as the Output Type
· Leave all attributes/data selected (or click *Check All* to reselect them all) on the Select Attributes page
· Enter or browse to a filename and location to export to
· To convert the XML output to **HTML** format, select the desired conversion in the *HTML conversion* field.
· Click the *Finish* button

Steps to export all Ultra Recall data to HTML:
· Start the Export Wizard
· Select *Documents and rich text items to HTML* as the Output Type

- Enter or browse to a folder to export to
- Click the *Finish* button

Notes:
- The HTML conversion options and output are defined by the subfolders and files within the *Export* folder in the Ultra Recall installation folder. The output and formatting can be modified by editing these files (requires knowledge of XSLT and HTML), and additional conversion choices can be defined by creating additional subfolders and related files. Within a folder, the XSLT file defines a stylesheet to apply to the exported XML file, an empty file specifies the name of the output file to be created when applying the stylesheet (defaults to *export.html* if no empty file is found), and any other files will be copied to the export folder.
- If all attributes are unchecked on the Select Attributes page of the Export Wizard when exporting XML, OPML will be exported. You will need to change the opening and closing *<oml>* and *</oml>* respective tags in the exported file for it to actually be a valid OPML.

See Also:
- Export Wizard
- OML/OPML
- Relationships

3.9   **Helpful Features**

Ultra Recall is a powerful program with many unique and time-saving features, including:

- Fully functional web browser
- Forward/back navigation
- Multiple tabs
- Hoisting
- Unlimited undo/redo
- Desktop shortcuts
- Spell checking
- Auto-correct
- Reminders
- Favorites
- Backup and restore
- Recycle Bin
- Item Locking
- Cross-DB copy
- Shared databases
- Combine Info Items
- Extensive Search Capability
- Multiple Selection
- Miscellaneous Features

3.9.1   **Web Browser**

Ultra Recall implements most internet browser functionality and can be used as your primary browser.

The following browser functionality is provided in Ultra Recall:
- Go Forward/Go Back
- Web Toolbar (with navigation history, auto-complete, IE is history updated with Ultra Recall navigation)
- Undo/Redo
- Web Page icon retrieval and display
- Web page editing

Alternatively, you can use any other browser as your primary browser and easily drag and drop shortcuts and selected parts of web pages into Ultra Recall, manage the web pages along with all your other information, and launch them in your browser from Ultra Recall.

See Also:
- Helpful Features
- Internal Browser View
- Internet Browser Mode
- Web Toolbar

3.9.2   Go Forward/Go Back

Ultra Recall provides full **Go Forward** and **Go Back** capabilities, similar to Internet Explorer or other browsers. However, this feature is extended to include all Info Items navigated to within Ultra Recall.

Go Forward/Go Back functionality simply remembers what Info Items and Web Toolbar *URLs* you have navigated to and provides several ways to redo this navigation in both directions (forward and back).

Each tab has a separate Forward/Back history.

In addition, the Go To menu provides another method to directly navigate to the most recent navigation history in either direction.

Ways to access:
Keyboard shortcuts: *Alt+Left Arrow* (go back)
                                      Alt+Right Arrow (go forward)
View Toolbar
Menu Bar: *View | Back*
                                      View | Forward

See Also:
- Helpful Features
- View Toolbar
- Undo/Redo

3.9.3   Multiple Tabs

Ultra Recall supports opening multiple Info Items and URLs in separate tabs. Many methods are available for manipulating tabs:
- Keyboard shortcuts
- Tab Menu
- Jump Dialog
- Favorites Dialog
- Favorites Toolbar
- Favorites Menu
- Reminder Dialog

3.9.4   Hoisting

Ultra Recall supports hoisting of the Data Explorer pane to temporarily limit the tree display tree to a subset of the entire tree hierarchy in the database. The tree can also be unhoisted to show the entire tree again. Any item except the root My Data item can be hoisted.

Hoisting and unhoisting are accessed via the Tree menu, toolbar, or keyboard shortcuts. To hoist, choose *Tree | Hoist* on the menu. If the root item of the tree is not the My Data item (house icon), the tree is hoisted. Use *Tree | Unhoist* on the menu bar to show the entire tree, or use *Go | Up On Level* to unhoist one level. If an item outside of the hoisted tree is navigated to, the tree will be unhoisted automatically.

Each tab can be hoisted to a different location, and hoists are persisted between sessions.

An option is also available to automatically hoist a Favorite when opening it.

Note: Available in Professional edition only.

3.9.5   Undo/Redo

While Ultra Recall can serve as your primary internet browser it does so much more by managing all your data and files regardless of source or type. You can edit each Info Item, add or remove Info Items, create templates, and much more. Fortunately, full **Undo** and **Redo** capability is provided which remembers the changes you have made and allows you undo and/or redo some or all of those changes.

All actions in Ultra Recall are **undoable**, except for the following list:
* Expanding/Collapsing nodes in the Data Explorer Pane or Search Pane
* Changes to the layout of the Related Items Pane
* Creating new Attributes
* Info Item Keyword changes
* Compact and Repair*
* Set Password*

* indicates features that also reset all Undo information.

Ways to Access:
Keyboard shortcuts: *Ctrl +Z* (undo)
                           Ctrl+Y (redo)
Standard Toolbar
Menu Bar: *Edit | Undo*
                           Edit | Redo

See Also:
* Helpful Features
* Functional Internet Browser
* Go Forward/Go Back

3.9.6   Desktop Shortcuts

Add a shortcut on your Windows desktop to any Info Item within an Ultra Recall Info Database for easy access to that item. Create the shortcut by selecting the item and choosing *Item | Create Desktop Shortcut* on the menu or typing Alt+Q (default shortcut).

Or, copy the command-line to open the selected Info Item to the clipboard via the *Item | Copy Item Command-Line* menu item. This can be used to integrate with other applications, opening the Info Item from another application when the command is executed (the Run dialog, Explorer, etc.).+

3.9.7   Spell Check

Any text that can be edited in Ultra Recall can be **spell checked**. This includes text in the Rich Text Editor, Text Document Editor, and the Item Notes Pane.

The image below shows the Spelling Dialog that is displayed for words detected as misspelled.
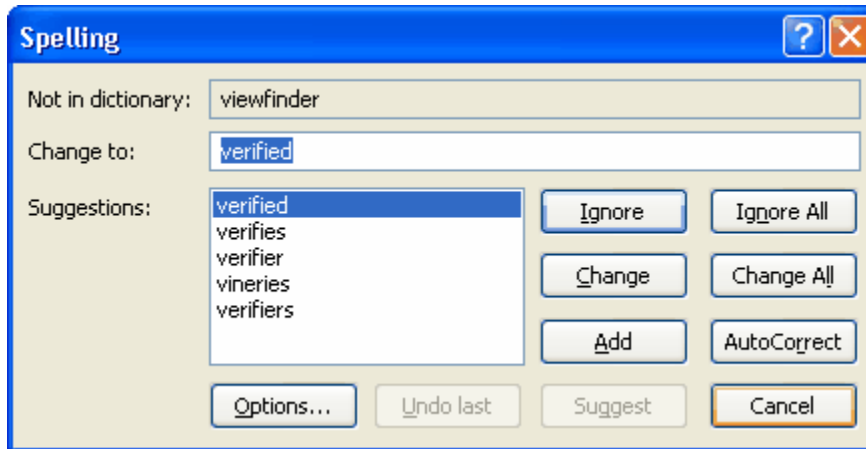
When a word is detected by Ultra Recall to be misspelled, it will be underlined with a red wavy line. From the context menu (right click on the highlighted word) you can choose from the suggested corrections to immediately correct an individual word.

Ways to spell check an entire body of text:
Menu Bar: *Tools | Spell Check*
Keyboard Shortcut: *F7*

The **spell check** dictionary included with the basic installation of Ultra Recall is English. Dictionaries in the following alternate languages are available for [download](#)/installation:
· Danish
· Dutch
· French
· German
· Italian
· Latin
· Polish
· Slovenian
· Spanish
· Swedish
· UK English

See Also:
· Helpful Features
· Spelling Options Dialog
· Rich Text Editor
· Text Document Editor

3.9.8   Auto Correct

Any text that can be edited in Ultra Recall can be **Auto Corrected**. This includes The Rich Text Editor , Text Document Editor, and the Item Notes Pane.

As you edit any text in the above places in Ultra Recall, the Auto Correct options you have configured will automatically be done for you.

See Also:

- Helpful Features
- Auto Correct Options Dialog
- Spell Check

3.9.9   Reminders

Reminders are a convenient way to be **reminded** or notified to view an Info Item at a particular time or date, even on a recurring basis if so desired.

By setting appropriate Begin Date, Begin Time and Reminder attribute values, a reminder will be displayed at the specified date and time. Setting an appropriate Recurring attribute value will instruct Ultra Recall to advance the Reminder on a recurring basis.

Note:
See Also:
- Reminders
- Attributes
- Item Attributes Pane
- Recurring Reminders
- Reminder Dialog
- Reminder Options

3.9.10   Favorites

Ultra Recall is a great application for storing any type of data and provides many methods to search, navigate and manage all of your information. Some of the information you add to Ultra Recall will be used often and would best be described as your favorite information.

Ultra Recall provides a simple way to directly access these **favorites** via the menu, toolbar, keyboard shortcuts, and the Windows system tray (right-click on the Ultra Recall icon). Simply add the desired Info Items to the **Favorites** list in each Info Database and optionally assign a keyboard shortcut as well.

See Also:
- Helpful Features
- Favorites Dialog
- Favorites Menu

3.9.11   Backup and Restore

One advantage of using Ultra Recall is that all your information can be managed with a single application and stored in a single Info Database. Info Databases are easily backed up, restored or moved, making backup and restore of your data a simple and reliable process.

If you store the contents of your files in Ultra Recall, even your external documents are stored within the Info Database ensuring that a backup (and subsequent restore) operation will include all of your important data.
Note: The Store contents when importing files or web page addresses user option is available to make storing the contents of external documents the default.

See Also:
- Helpful Features
- Info Database
- Store Contents
- Options Dialog
- Options: Import Dialog

3.9.12 Recycle Bin

Ultra Recall provides **Recycle Bin** functionality, which works very similar to the Windows Recycle Bin. As Info Items are deleted, they are moved to the **Recycle Bin** (each Info Database has its own). You can delete Info Items permanently (without moving to the **Recycle Bin** by holding *Shift* when deleting).

The Ultra Recall **Recycle Bin** can be emptied by right clicking on the **Recycle Bin** and choosing *Empty Recycle Bin*.

Ways to Access:
Keyboard shortcut: *Del*
Standard Toolbar
Menu Bar: *Edit | Delete*

See Also:
* Helpful Features
* Delete
* Info Item
* Info Database

3.9.13 Item Locking

An Info Item can be locked to prevent it from being modified or deleted. When an item is locked, its icon will indicate that it is locked, and the item's title, attributes, and details can't be modified until it is unlocked. The item can still be moved or sorted, and it will still get deleted if one of its ancestors is deleted.

Ways to Access:
Item Toolbar
Menu Bar: *Item | Lock*

See Also:
* Helpful Features
* Item Menu

3.9.14 Copying/Moving between Info Databases

Info Items can be copied or moved between different Info Databases using Drag & Drop or Copy and Paste.

When dragging Info Items between different Info Databases (simultaneously open in two instances of Ultra Recall), focus the destination Info Database (if it isn't currently visible) by hovering over its taskbar icon momentarily to focus it. The Data Explorer Pane will scroll up or down (or expand as necessary) to the desired drop location by hovering at the top or bottom (or over the Info Item that needs expand).

When the copied/moved Info Items are based on Derived Templates not in the destination Info Database, the related Derived Templates (and any associated Attributes) will be copied automatically to the destination Info Database.

Copying Info Items between Info Databases is also the way to copy user-created Attributes between Info Databases. When an Info Item containing Item Attributes for any custom Attribute is copied to a different database, these custom Attributes are also copied. If the Info Item is deleted in the

destination Info Database after the copy, the Attributes that were created will not be deleted.

See Also:
· Copy
· Move
· Drag & Drop
· Copy and Paste
· Attributes
· Data Explorer Pane

3.9.15 Shared Info Databases

Ultra Recall allows multiple users to open the same Info Database (located on a network share or shared folder) simultaneously for editing. The first user to select an item will be able to edit that item, but that item will be locked from editing (read-only) for all other users until the first user selects another item or closes the database. For all items being edited by other users, a lock indicator will be displayed over the item's icon in the Data Explorer pane, and when a locked item is selected, the READ indicator in the status bar will be enabled and the user will not be allowed to modify or delete the item.

Notes:
· Additions or deletions by other users may not be visible until the display is refreshed (Tree | Refresh All on the menu or Shift+F5).
· Remote users will need LAN type network speed for reasonable performance when accessing a remote database. One option when only a slower link is available (i.e., VPN or dialup) is remote access software (Remote Desktop, Terminal Server, PCAnywhere, WinVNC, etc.). Another option is to copy the .urd file onto a local drive or USB stick for offline viewing/editing and copying back to the server path when LAN access is available again (if it was modified).
· Available in Professional edition only.

3.9.16 Combine Info Items

Multiple Info Items (including titles, form fields, rich text or item text) can be **combined** into a new Text Info Item using the following procedure:
1.   Select the Info Items to be **combined**
2.   Copy them to the clipboard (*Edit | Copy or Ctrl+C*)
3.   Navigate to the location for the new **combined** Info Item
4.   Use the *Paste Rich Text/Paste Rich Text with titles* option to paste the **combined** Rich Text (available at *Edit | Paste Special* on the menu)

See Also:
· Print Multiple Info Items
· Import Rich Text
· Helpful Features

Note: Available in Professional edition only.

3.9.17 Rename Info Items

An Info Item can be quickly renamed to the selected text in the Item Details pane (for the Internal Browser Viewer, Rich Text Editor and Text Document Editor) or the Item Notes pane:
1.   Select the text in the specified pane
2.   Choose Rename Item on the right-click menu (*Edit | Rename* on the menu or *F2*).

An Info Item can also be quickly renamed to the current date, time, or date+time (via the *Item | Rename To* menu).

See Also:
· Helpful Features

Note: Available in Professional edition only.

3.9.18 Extensive Search Capability

Once information is organized in Ultra Recall, extensive search capabilities are provided which facilitate recalling and retrieving it on demand.

Some of the search technologies provided include:
· Automatic Keywording
· Quick Searches
· Advanced Searches
· Saved Searches
· Phrase Searches

3.9.19 Multiple Selection

Ultra Recall allows **multiple selection** in several places, which facilitates efficient copying, moving, viewing, printing, tagging, editing, and analysis of multiple Info Items. The selection doesn't need to be contiguous but does need to be in the same Pane.

How to **multi-select** Info Items:
· With the mouse:
   · Hold the *Ctrl* key while left-clicking to select or unselect individual **multiple** Info Items
   · Left-click to select an item, then hold the *Shift* key and click another item to select a contiguous range
· With the keyboard:
   · Press the *Space bar* to select or unselect an item
   · Use Ctrl+Arrow keys to navigate to different Info Items, and press *Ctrl+Space* to select or unselect individual Info Items
   · Use Ctrl+Arrow keys to navigate, press Shift+Space to select all items between the selected item and the focused item

Panes that allow multiple Info Item selection:
· Search Pane
· Data Explorer Pane
· Related Items Pane

Other Pane Behavior (with multiple selection):
· **Item Details Pane**: This pane is disabled and displays the count of selected Info Items when multiple Info Items are selected, unless the user option to *Show combined text for multiple selection* is checked.

· **Item Attributes Pane**: When multiple Info Items are selected in any of the above panes, the Item Attributes Pane will only display the Attributes that are common to all the selected Info Items, and will only display values when identical for every selected Info Item. If one of these shared Attribute values is edited, the new value will be assigned to every selected Info Item.

· **Related Items Pane**: When multiple Info Items are selected in either the Search Pane or the Data Explorer Pane, the Related Items Pane will have the caption of *Selected Items*, and will display info about the selected Info Items instead of child Info Items.

· **Item Notes Pane**: This pane is disabled with multiple **Info Item** selection.

- **Item Parents Pane**: This pane displays the combined list of parent Info Items for the selected Info Items.

- **Item Keywords Dialog**: This dialog will show all keywords common to all the selected items, and editing the keywords will affect all selected items.

See Also:
- Selection
- Panes
- Printing Multiple Items
- View Multiple Items
- Editor Options

3.9.20 Miscellaneous

Some additional helpful features are:

Reload of recently opened databases: When exiting Ultra Recall via File | Exit on the menu, Ultra Recall remembers the currently open Info Databases and reopens them when Ultra Recall is restarted. Also, any Info Databases in the same path as the program executable will also be opened. Automatic reopening of databases can be disabled by holding down the Shift key when starting Ultra Recall. To specify a custom list of databases to open at startup, create shortcuts to the .urd files to open in the Startup folder of the Window Start menu.

Info Item Expand/Collapse is persisted: When Info Items with children are expanded or collapsed, this state is remembered for future uses of the Info Database. When the Info Database is reopened, the previous expanded state of each Info Item in the Data Explorer Pane and Search Pane will be restored.

Current Info Item is remembered: When an Info Database is closed, the current Info Item is automatically recorded, and is reselected when the Info Database is reopened. This is very helpful and works much like a car CD player, remembering where you are when you stop so you can later continue where you left off.

User-defined new Info Database: When a new Info Database is created, by default a pre-defined Info Database is used. A user-defined Info Database can replace this default by placing your own Info Database, named *template.urd*, in the user's Ultra Recall data folder (typically *C:\Documents and Settings\<UserName>\Application Data\Kinook Software\UltraRecall*).

Collapse siblings when expanding an item mode which helps minimize tree clutter by limiting the number of expanded tree branches as you navigate the hierarchical trees in Ultra Recall.

Saved Searches: After defining and using a search of any type, you can easily save the search for later use by using the Copy button.

See Also:
- Helpful Features
- Info Database
- Info Item
- Saved Searches
- Tree Options

3.10 Getting Things Done (GTD)

One popular organization method of organizing information is David Allen's *Getting Things Done* system. Ultra Recall lends itself well to implementing GTD solutions, even extending the concept with Logical Linking and Advanced/Nested Search capabilities.

See Also:
- GTD sample
- Getting Things Done
- Logical Linking
- Searching
- Nested Searches

4 Application Components

The main application window of **Ultra Recall** is comprised of several components as shown below:
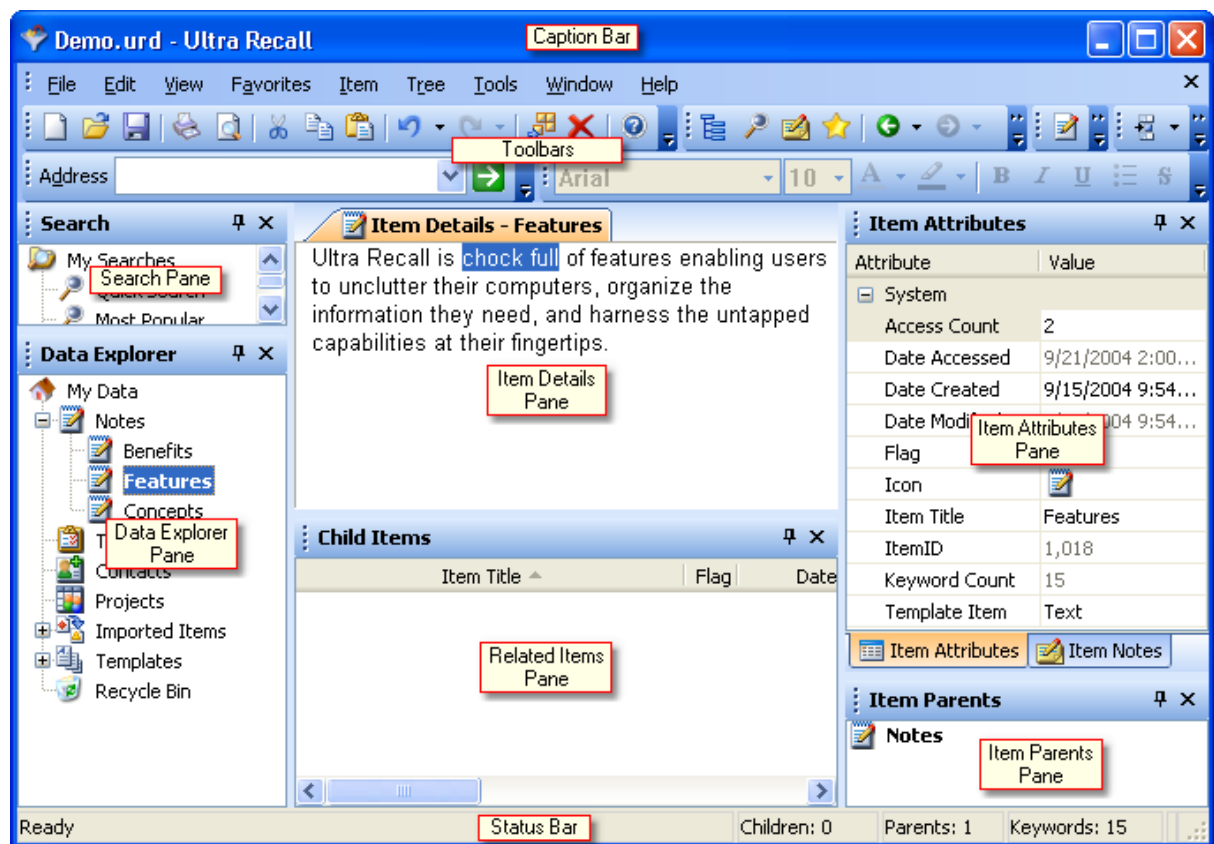
Click on the different regions of the above image to view more detail about each component.

The main Ultra Recall screen is comprised of several dockable panes (with optional auto hide capability) providing limitless configuration flexibility. The image above shows the default configuration of the different panes of a Layout. All but the Item Details Pane are dockable and have Auto hide capability.

Also see the Getting Started help topic for a tutorial on getting started with Ultra Recall.

4.1　Menu Bar

The **Menu Bar** is the main menu for the Ultra Recall application.

File　Edit　View　Favorites　Item　Tree　Tools　Window　Help　　×
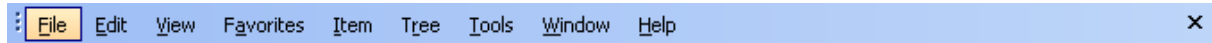
All Ultra Recall features are available from the **menu** via the mouse or keyboard, and keyword shortcuts are also available for a majority of the features as well.

The **Menu Bar** can also be repositioned (docked) anywhere around perimeter of the Ultra Recall application and can also be undocked and moved anywhere on the screen (independent of the rest of the Ultra Recall application).

The **Menu Bar** can be customized the same the way Toolbars are customized. You can remove or rearrange menu entries and add any available command as a menu entry. You can also reset the **Menu Bar** the same way as resetting a Toolbar.

Most keyboard shortcuts can be modified as well, using the Customize Dialog.

See Also:
- Menus
- Toolbars
- Customizing

4.2　Toolbars

Toolbars are the groups of graphic and/or text buttons that provide direct access to Ultra Recall functionality with the mouse.

Here is the Standard toolbar (which provides direct access to *core* Ultra Recall functionality):

By hovering the mouse over a button of a toolbar, a tool tip will be displayed that gives additional detail about what that particular toolbar button does when depressed. Click on a **toolbar** button to invoke the related feature.

To display or hide a toolbar, either right-click on the menu bar or a toolbar, then click on the toolbar to show or hide, or choose *View | Toolbars | <toolbar name>* on the menu.

Default **Toolbars**:
- Standard Toolbar
- View Toolbar
- Database Toolbar
- Color Toolbars
- Favorites Toolbar
- Flag Toolbar
- Insert Child/Sibling Toolbars
- Layouts Toolbar
- Tree Toolbar
- Item Toolbar
- Format Toolbar
- Web Toolbar

Toolbars are very configurable and can be customized in various ways:
- Repositioned
- Buttons can be Added or Removed
- New **Toolbars** can Created and existing **Toolbars** can be Deleted

Notes:
- All program features are also available on the menu bar, and most of them also have keyboard shortcuts defined.
- As you can see from the *Standard* Toolbar above, not all the icons are in color. When the icon is 'greyed out', it means that button is currently not clickable. This is because the related feature is not available based on where the focus currently is.

Note: Some menus and toolbar items can also be "torn off" (by dragging and dropping the top part of the menu) and converted to toolbars.

See Also:
- Toolbar Customizing
- Dockable Panes
- Menu Bars

4.2.1 Color Toolbars

The **Color** Toolbars can be used to edit the font and highlight colors in the text editor.
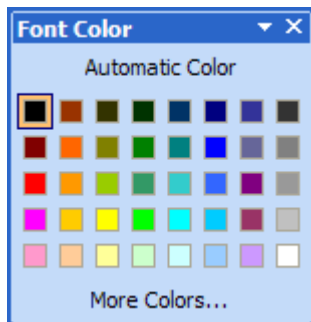
The color toolbars are created by tearing off (dragging the top part of) the Font Color and Highlight Color drop-down buttons on the Format Toolbar.

4.2.2 Database Toolbar

The **Database** Toolbar provides another method for switching between multiple open Info Databases, in addition to the Windows menu. Click on a database name to switch to that database.

4.2.3 Favorites Toolbar

The **Favorites** Toolbar provides another method for accessing Favorites. Click on a favorite button to select that Info Item.

Note: Hold down the Control key (or check the New tab checkbox on the Favorites dialog) when clicking on a favorite to open it in a new tab.

4.2.4 Flag Toolbar

The **Flag** Toolbar can be used to change the Flag attribute of the selected item(s).

Create the Flag toolbar by tearing off (dragging the top part of) the Flag drop-down item of the Item menu.

4.2.5   Format Toolbar

The **Format** Toolbar provides direct access to the rich text formatting and web page editing features in Ultra Recall.

The **Format** Toolbar (be default) allows the following text formatting features to be set for the selected rich text:
· Styles
· Font
· Font Size
· Font Color
· Background Color
· Bold
· Italics
· Underline
· Bullets
· Numbering
· Indentation
· Line Spacing
· Tables
· Hyperlinks

The Font Color and Background Color drop-downs can be "torn off" (by dragging and dropping the top part of the control) and converted to toolbars.

Note: this toolbar will only have enabled buttons when a control with rich text is selected, or if a web page item is being edited, including:
· Rich Text Editor
· Item Details Pane (when rich text is being displayed)
· Item Notes Pane
· Internal Browser View

4.2.6   Insert Child/Sibling Toolbars

The Insert Child and Insert Sibling Toolbars provide another method for inserting items into the Data Explorer Pane.

Create the Insert Child or Insert Sibling toolbars by tearing off (dragging the top part of) the Insert Sibling or Insert Child drop-down item of the Tree menu.

4.2.7   Item Toolbar

The **Item** Toolbar provides direct access to features related to Info Items in Ultra Recall.

The **Item** Toolbar provides access to features such as:

- Open Document
- Explorer Menu
- Synchronize
- Store Contents
- Lock
- Add Reminder
- Import
- Export

4.2.8　Layouts Toolbar

The Layouts Toolbar provides another method for changing pane layouts.

Create the Layout toolbar by tearing off (dragging the top part of) the Layouts drop-down item of the View menu.

4.2.9　Standard Toolbar

Many of the commonly used features of Ultra Recall are available from the **Standard** Toolbar.

The **Standard** Toolbar (by default) provides access to features such as:
- New
- Open
- Save
- Tabs
- Print
- Print Preview
- Cut/Copy/Paste
- Undo/Redo
- Insert
- Delete
- Help

4.2.10　Tree Toolbar

The **Tree** Toolbar provides direct access to features related to Info Items and their relationships in the Data Explorer Pane. From this toolbar you can insert new Info Items, and reposition items in the Data Explorer Pane and the Advanced Search grid.

The **Tree** Toolbar (be default) provides access to features such as:
- Insert Child
- Insert Sibling
- Move Up
- Move Down
- Move Left
- Move Right
- Jump
- Link/Move/Copy
- Hoisting

4.2.11 Web Toolbar

The **Web** Toolbar displays the *URL* when Ultra Recall is displaying content in the internal browser, and allows direct entry/navigation of the internal browser to the *URL*that is entered.

The **Address** Toolbar consists of a text box for a *URL* (with history capability) and a *Go* button (which works identically to any modern browser such as Internet Explorer).

The width of this toolbar can be modified in the Application Options dialog, under the Browser tab. The setting is called: *Web Address Toolbar Combo | Combo box width*.

Note: The application must be restarted for changes to this setting to take effect, the default width is 300.

The purpose and functionality of the **Web Toolbar** is similar to the address bar of Internet Explorer. This functionality includes:
* Auto-complete from navigation history
* Auto-complete for local and network files while typing
* Honors the IE SearchUrl registry settings
* Drop-down combo of typed addresses (*F4)* works similar to IE but with list specific to Ultra Recall (with *Del* to remove an item and size configure in options)
* pages visited in Ultra Recall are also added to IE history (may require IE6)

Standard keyboard shortcuts:
* *Alt+D* shortcut to focus the Address combo (Esc to return to the previously active pane).
* *Ctrl+Enter* to fill in www.<text>.com and navigate.
* *Alt+Enter* to open the URL in a new tab.
* Click/*Enter* on a URL in browser opens it (Shift+click or *Shift+Enter* opens in an external browser; Control+click or Control+Enter opens in a new tab).
* *Backspace/Alt+Left Arrow* goes back, *Alt+Right Arrow* goes forward.

See Also:
* Internal Browser View
* Windows Explorer Mode

4.2.12 View Toolbar

The **View** Toolbar provides direct access to view/navigation features. This Toolbar allows you to search, go back/forward, switch the focus between the different Panes of Ultra Recall, and categorize/alphabetize what is displayed in the selected Pane (if applicable).

The **View** Toolbar (be default) provides access to features such as:
* Data Explorer Pane
* Quick Search
* Search Pane
* Item Notes Pane
* Go Back / Go Forward (navigation)
* Stop (only enabled when something that can be aborted is being executed, like loading a web page)
* Refresh the application
* Toggle between the available Layouts

- Choose Columns ... Dialog
- Sort the selected Pane data alphabetically (if applicable)
- Categorize the selected Pane data (if applicable)

4.2.13 Customizing

Each Ultra Recall Toolbar is highly **customizable**, and new Toolbars can also be created and deleted to suit your needs.

Toolbar **modifications** you can make:
- Create and Remove new Toolbars
- Hide or Display individual Toolbars
- Add or Remove Buttons
- Reposition/Dock/Undock Toolbars

Toolbar Customization can be accomplished in two ways:
1) By displaying the Customize Dialog
- *Tools | Customize* (from the menu)
- Right-click any Toolbar, then choose *Customize*
- Clicking the *Down Arrow* at the end of each Toolbar, then choosing *Customize*
2) Add/Remove/Reset buttons for a Toolbar with the menu available by clicking the *Down Arrow* at the right end of each Toolbar

Notes:
- Customizations should be performed with only one database open, and exit and restart Ultra Recall after customizing.
- Toolbar, menu, and keyboard customizations are stored in the user's application data folder (`%APPDATA%\Kinook Software\Ultra Recall` or `C:\Documents and Settings\<username>\Application Data\Kinook Software\Ultra Recall`). To reset all user customizations to their defaults, exit Ultra Recall and delete all `Layout*.dat` and `UltraRecall.dat` files in the above folder.

4.2.13.1 Creating Toolbars

You can easily **create** new Toolbars to suite your needs. One reason for **creating** a new Toolbar is if there is a group of buttons you often use that you want to display together.

Steps to **create** a new Toolbar:
1.   Display the Customize Dialog
2.   On the Toolbars tab, click the *New...* button
3.   Enter an appropriate name for the new Toolbar, then click OK
4.   Add buttons to this new Toolbar
5.   Close the Customize Dialog
6.   Reposition your new Toolbar

4.2.13.2 Deleting Toolbars

Any user-created Toolbar can be **deleted**. If you only want to hide the Toolbar, you can easily do this without **deleting** it.

Steps to **delete** a user-created Toolbar:
1.   Display the Customize Dialog
2.   Select the user-created Toolbar to be deleted in the Toolbar list
3.   Click the **Delete** button (if it is disabled [grey], then the selected Toolbar is a *system* Toolbar and can't be deleted)

4. Close the Customize Dialog

4.2.13.3 Hide/Display Toolbars

You can easily **hide** Toolbars or display **hidden** Ultra Recall Toolbars.

1. Steps to toggle whether a Toolbar is **displayed** or not:
2. Display the Customize Dialog
3. Check/Uncheck the checkbox next to each Toolbar (checked means displayed)
4. Close the Customize Dialog

4.2.13.4 Reset Toolbars

You can easily **reset** any modified system Ultra Recall Toolbars to their original state.

Steps to **reset** an Ultra Recall Toolbar:
1. Display the Customize Dialog
2. Select the user-created Toolbar to be deleted in the Toolbar list
3. Click the **Reset** button (if it is disabled [grey], then the selected Toolbar is a not *system* Toolbar and can't be reset)
4. Close the Customize Dialog

4.2.13.5 Reposition Toolbars

Ultra Recall Toolbars can be **repositioned** (*docked*) around the entire perimeter of the Ultra Recall application, or even *undocked*, which converts them into a detached dialog, and can be placed anywhere on the screen.

How to **reposition** an Ultra Recall Toolbar:
1. Drag the Toolbar to the desired location
   - If currently docked, drag the Toolbar from the Toolbar handle at the left-edge to (see the *docked* Format Toolbar depicted below)
   - If currently undocked, drag the Toolbar by its upper blue caption bar (see the *undocked* Format Toolbar depicted below)
Note: If you drop the Toolbar around the perimeter of the Ultra Recall application, the Toolbar will become docked.
Note 2: The outline that is displayed as you drag indicates where the Toolbar will dock when the mouse is released.

The Format Toolbar in *undocked* mode:
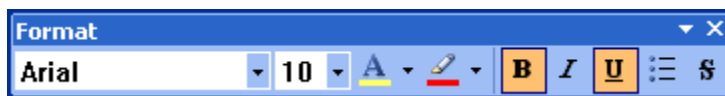
The Format Toolbar in *docked* mode:

4.2.13.6 Add/Remove Toolbar Buttons

It is very simple to **add** or **remove** buttons from an existing Toolbar in Ultra Recall.

You can directly **add/remove/reset** the buttons displayed for Toolbars by clicking the *Down Arrow* at the right end of each Toolbar.

You can also **add** and/or **remove** Toolbar buttons while the Customize Dialog is displayed.

- To **remove** an existing Toolbar button:
  1. Click and *drag* the button to remove onto the Customize Dialog. When you *drop* the button, it will be removed from the Toolbar

- To **add** a new button to an existing Toolbar:
  1. Click the *Commands* tab of the Customize Dialog:

  2. Select (click on) the *Category* of the *command* you want to add (use *All Commands* if unsure)
  3. Drag the *Command* desired from the *Commands* list (in the Customize Dialog) onto the Toolbar you wish to add it to.

4.2.13.7 Modify Toolbar Buttons

Toolbar buttons can be highly modified. You can change the image, the text, show only the image, the text or both, and reorder/regroup the buttons within a Toolbar.

All Toolbar button customization is done with the Customization Dialog displayed.

Note: You can reposition the Customize Dialog so it is not covering any Ultra Recall Toolbars by dragging it with the blue caption bar anywhere on the screen.

The image below shows Ultra Recall with the Customize Dialog displayed:
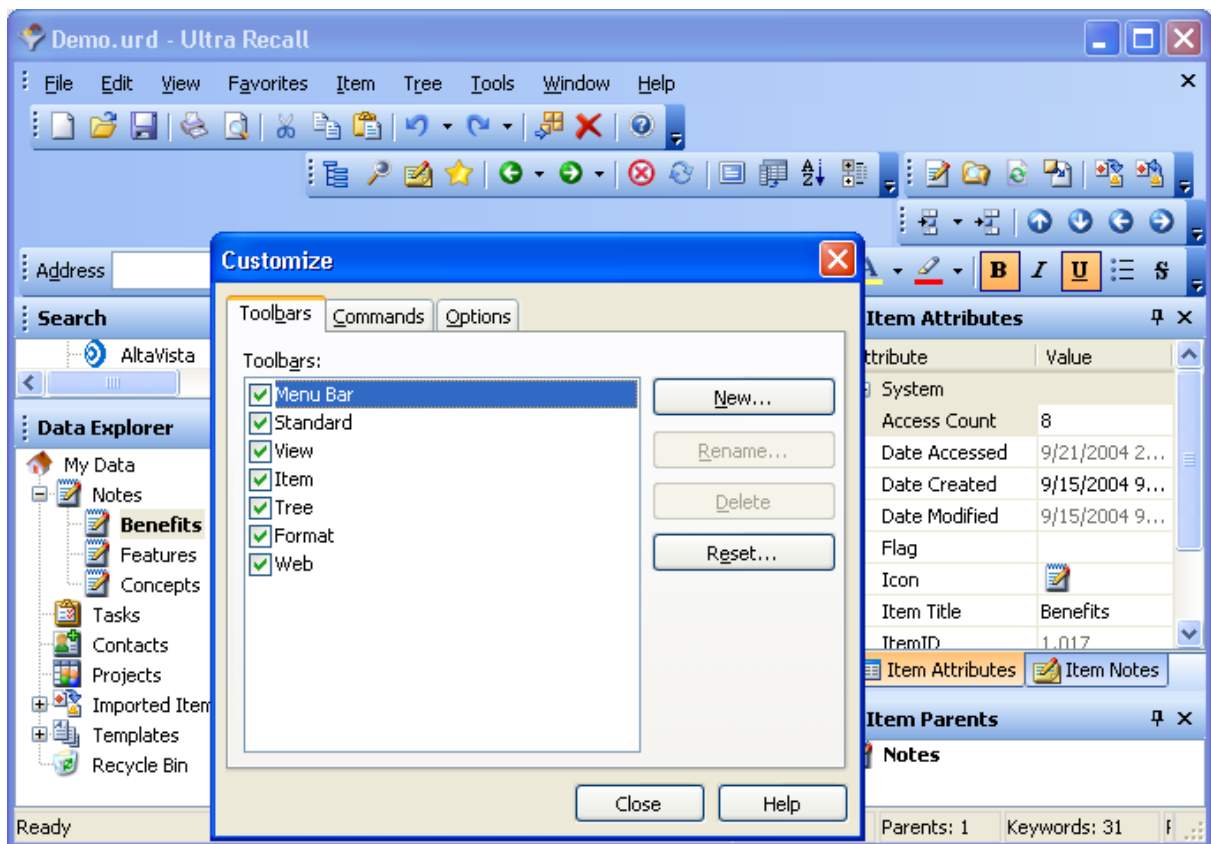
Right-click on any Toolbar button and make a choice in the displayed menu for what modification you desire to do.

Note: Any button that has been modified can be reset to default with the Reset menu choice.

4.2.13.8 Options

Several **options** related to Toolbars and the Menu Bar can be customized as well. These **options** are viewed and changed on the **Options** tab of the Customize Dialog.

Personalized Menus and Toolbars

Always show full menus: Checking this box will ensure all menu items are always displayed when a menu is selected. If not checked, the Ultra Recall will initially only show the menu items that have been recently viewed.

Show full menus after a short delay: If this box is checked (and enabled), Ultra Recall will display full menus after a short delay from they are displayed. If this box isn't checked, the only way to see the full menu is to click the bottom *Expand* button displayed with each personalized menu (this button disappears when the full menu is displayed).

Other

Paint Theme: This multiple selection combo box allows you to select one of several available themes that affect both Toolbars and the Menu Bar.

Large Icons: Checking this box will show larger than normal Toolbar and Menu Bar icons.

Show ScreenTips on toolbars: When this box is checked, Ultra Recall will show tool tips when the mouse is hovered over Toolbar buttons.

Show shortcut keys in ScreenTips: When this box is checked (and enabled), Ultra Recall will include any associated keyboard shortcut keys in displayed ScreenTips.

Menu Animations: Either select the *System Default* value, or an alternate Menu Bar animation feature with this combo box.

See Also:
- Toolbar Customizing
- Menu Bar

4.3 Panes

The Ultra Recall application is made up of several **panes**, with each **pane** having a specific purpose.

These primary **panes** are:
- Calendar
- Data Explorer
- Search
- Item Details †
- Related Items (Child Items / Selected Items / Search Results) *
- Item Attributes
- Item Notes
- Item Parents

* this window changes its caption, layout and content based on which Selection Pane is Primary
† all the **panes** can be hidden, maximized, restored, undocked and/or set to Auto hide except for this Pane

By separating the different features or functions of Ultra Recall into separate **panes**, the application is very modular. All but the Item Details Pane are optional (they can be hidden from the current Layout), and can be extensively reconfigured to suit your needs.

Each **pane** description below is based on this instance of Ultra Recall:
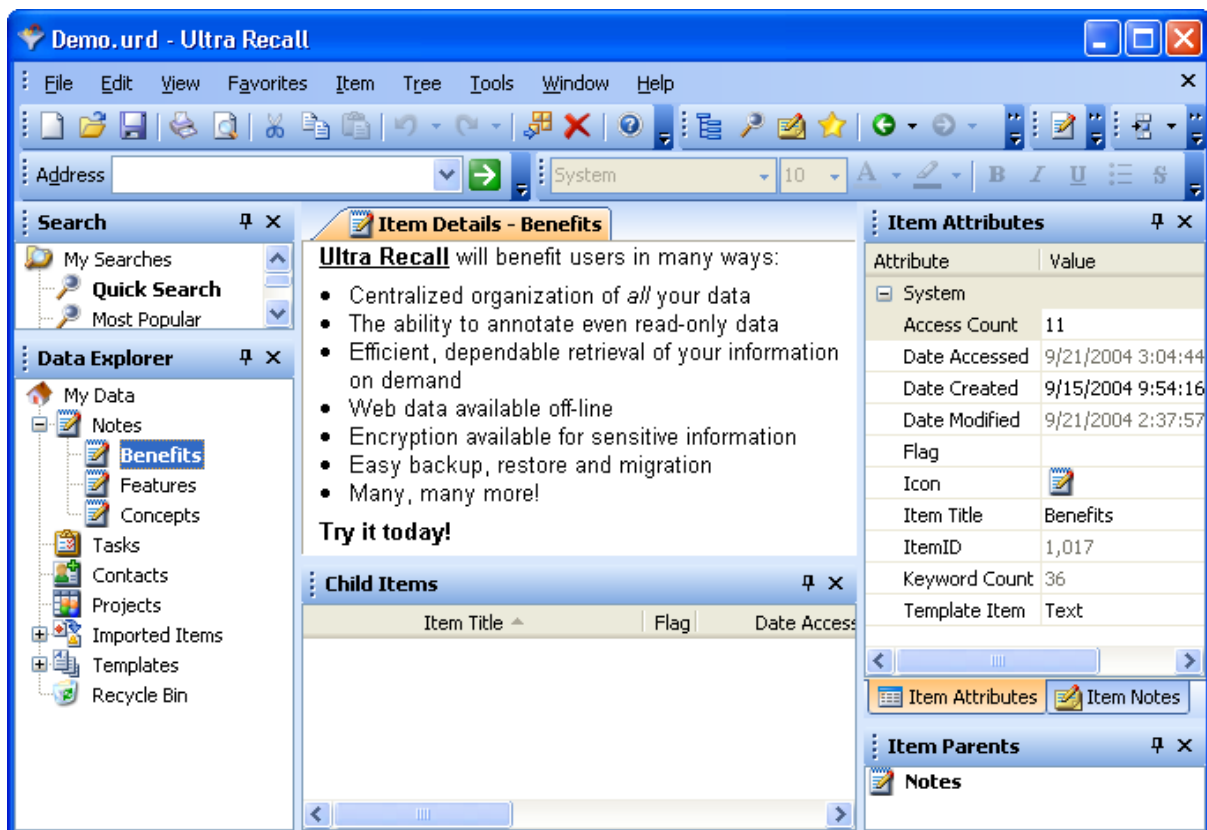
4.3.1 Calendar Pane

The **Calendar Pane** is a convenient way to view a calendar, select a date, and either insert the selected date into Ultra Recall at the last edited location or copy the date value onto the clipboard. To display the calendar pane, select *View | Other Windows | Calendar* on the menu or press Alt+C.
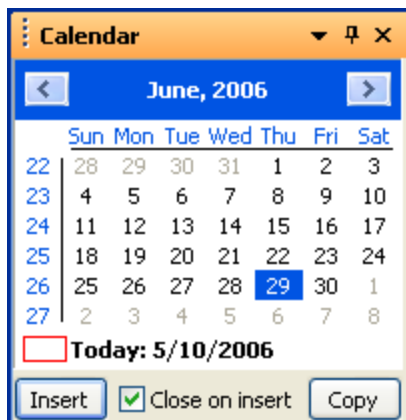
Navigating the calendar: The calendar can be navigated via the keyboard in various ways:
- Arrow keys to move one day at a time.
- Page Up and Page Down to move one month at a time.
- Ctrl+Page Up and Ctrl+Page Down to move month year at a time.
- Home and End to move to the first or last day of the month.

Mouse navigation is also supported:

- Click on a day to select that day.
- Click on Today to select the current date.
- Click the arrow buttons to move one month at a time.
- Click on the year, then click the up/down buttons to change years.
- Click on the month, then select a month to change months.

Insert button: Copies the selected date to the clipboard, closes the pane (if the Close on insert checkbox is checked), and pastes the value at the last edited location in Ultra Recall. It is the default button, so pressing Enter is the equivalent of clicking this button.

Copy button: Copies the selected date value onto the clipboard (so it can pasted elsewhere).

How to access:
- Menu Bar: *View | Other Windows | Calendar*
- Keyboard: *Alt+C*

Note: The current date and time can also be inserted at the current location via the keyboard shortcut *Alt+Z.*

See Also:
- Date Time Attributes
- Date Attributes
- Time Attributes

4.3.2   Data Explorer Pane

The **Data Explorer Pane** is the part of Ultra Recall that displays and manages the relationships between Info Items. To go to the Data Explorer pane, select *View | Data Explorer* on the menu or press Ctrl+1.

This pane is a Selection Pane, which provides access to one of Ultra Recall's innovations, Logical Linking.

For most users, the **Data Explorer Pane** will be the most frequently used part of Ultra Recall. The Data Explorer Pane is the organizational center of Ultra Recall, where you can:
- Maintain the unlimited relationships between Info Items using Logical Linking
- Browse your information hierarchically
- Rearrange, drop, paste, or initiate new Info Items into an Ultra Recall Info Database
- Remove obsolete Info Items

Here is an example of data displayed in the **Data Explorer Pane**:
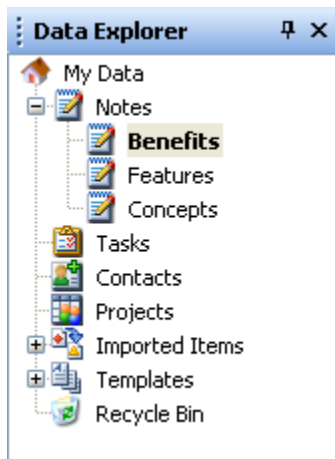
Almost any content, including URLs, text, emails, etc can be dropped or pasted into the **Data Explorer Pane** to create new Info Items.

Hoisting can be used to display only a subset of the entire tree within the Data Explorer pane.

How to access:
- Menu Bar: *View | Data Explorer*
- Keyboard: *Ctrl+1*

See Also:
- Keyboard Shortcuts
- Global Keyboard Shortcuts
- Capturing Information
- Drag and Drop
- Copy and Paste

4.3.3   Search Pane

The **Search Pane** is where predefined searches are located, where new searches are saved to (by default). To go to the Search pane, select *View | Other Windows | Search* on the menu or press Ctrl+0.

By default the **Search Pane** is located in the upper left corner of the Ultra Recall application, but it can be moved anywhere (including outside of the application boundaries if you undock it).

The image below shows the Search Pane:
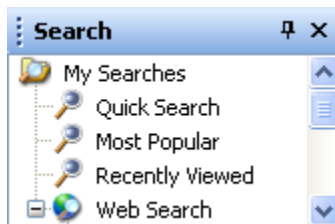
Because each Search Info Item functions like every other Info Item, the image below shows how the related panes function when a Search Info Item is selected:
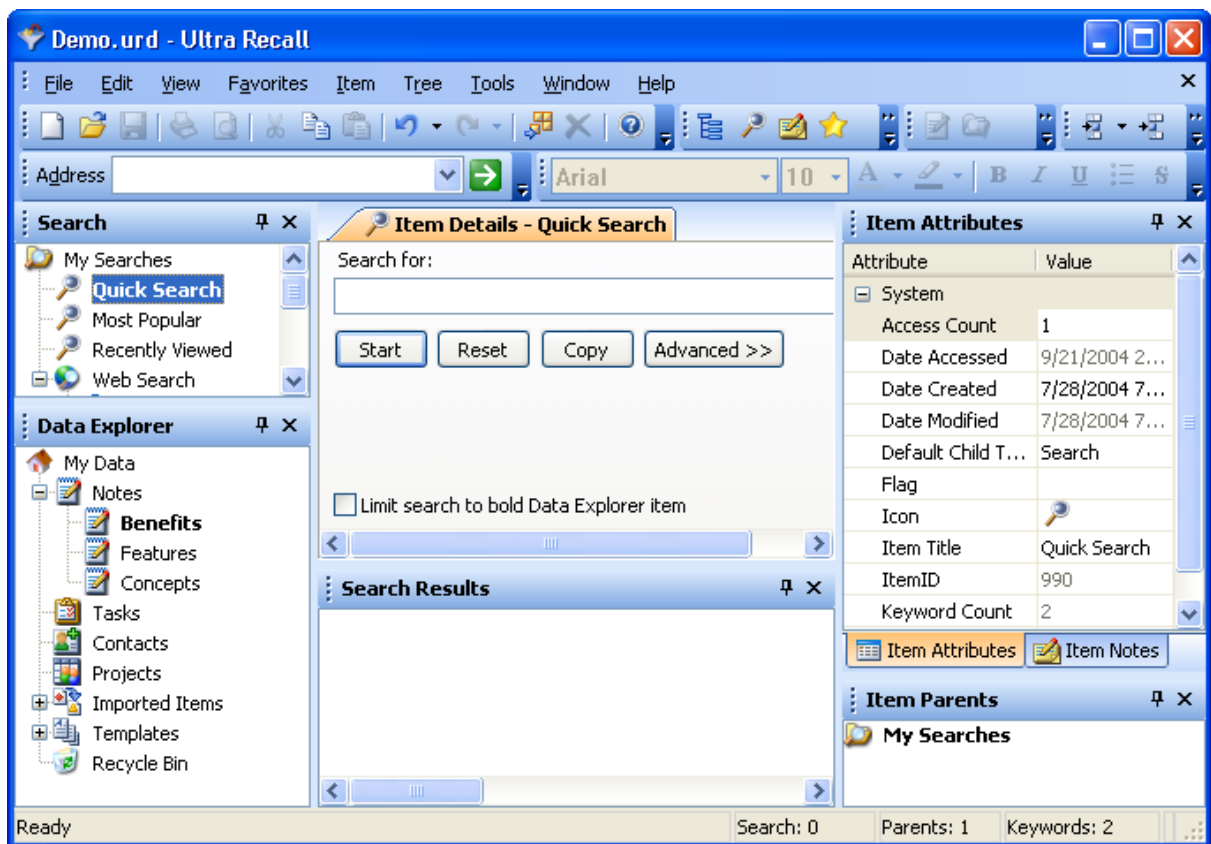
Note: Search Info Items can also be located in the Data Explorer Pane. You can copy or move Search Info Items between the Search Pane and the Data Explorer Pane.

How to access:
* Menu Bar: *View | Other Windows | Search*
* Keyboard: *Ctrl+0*

See Also:
* Keyboard Shortcuts
* Global Keyboard Shortcuts
* Searches

4.3.4   Item Details Pane

The **Item Details Pane** is the pane that displays the primary information of the Info Item. To go to the Item Details pane, select *View | Item Details* on the menu or press Ctrl+2. The Item Details pane can display a wide range of information types:

* Internal Browser Viewer allows display and editing of web content, Office documents and PDF files, and direct browsing (in conjunction with the Web Toolbar).
* Contact Editor provides a convenient way to view and modify common attribute values for Contact Info Items.
* Form Viewer provides for viewing and editing of item attributes in form fields.
* Rich Text Editor displays and edits rich text.
* Mime Viewer allows viewing of email and other mime content (such as news group posts).
* Search Criteria Editor allows searches (both Quick and Advanced Searches) to be defined and

executed.
- Text Document Editor displays and edits plain text.
- Image Viewer displays images.
- Other document types can be configured for editing externally in their associated application.

The image below shows the **Item Details Pane** displaying the Browser Viewer (showing the Google Web Search Info Item):
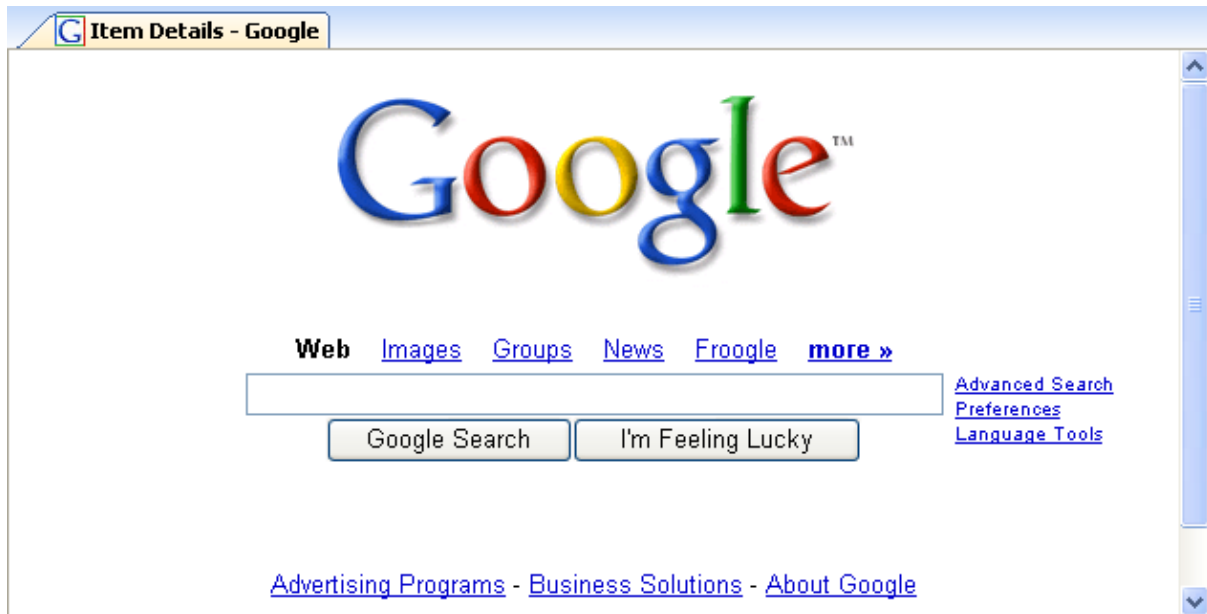
Notes:
- When the **Item Details Pane** is displaying the contents of a stored document, *[Stored]* will be present in the Title before the title of the Info Item at the top of the Pane.
- To prevent a document item from being displayed in the configured viewer, hold down the Alt key when selecting the item in the selection pane.
- If no viewer is configured for a document (or Alt is held down), Ultra Recall is able to parse the document's text, and the option to show item text for documents without a viewer is checked, the document's text will be displayed read-only in the Rich Text Editor.

How to access:
- Menu Bar: *View | Item Details*
- Keyboard: *Ctrl+2*

See Also:
- Web Toolbar
- Format Toolbar
- Keyboard Shortcuts
- Global Keyboard Shortcuts
- Text Formatting Shortcuts

4.3.4.1   Internal Browser View

When a Selection Pane has selected an Info Item with HTML content, the Item Details Pane will use the **Internal Browser View** to display or edit it.

The **Internal Browser View** version of the Item Details Pane:
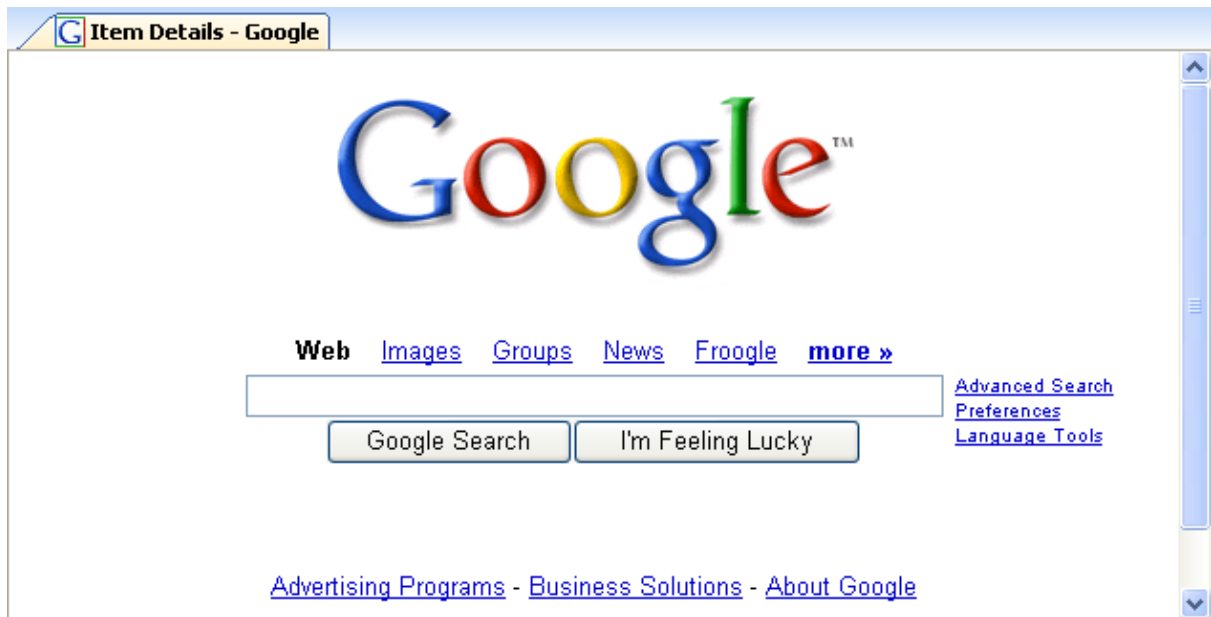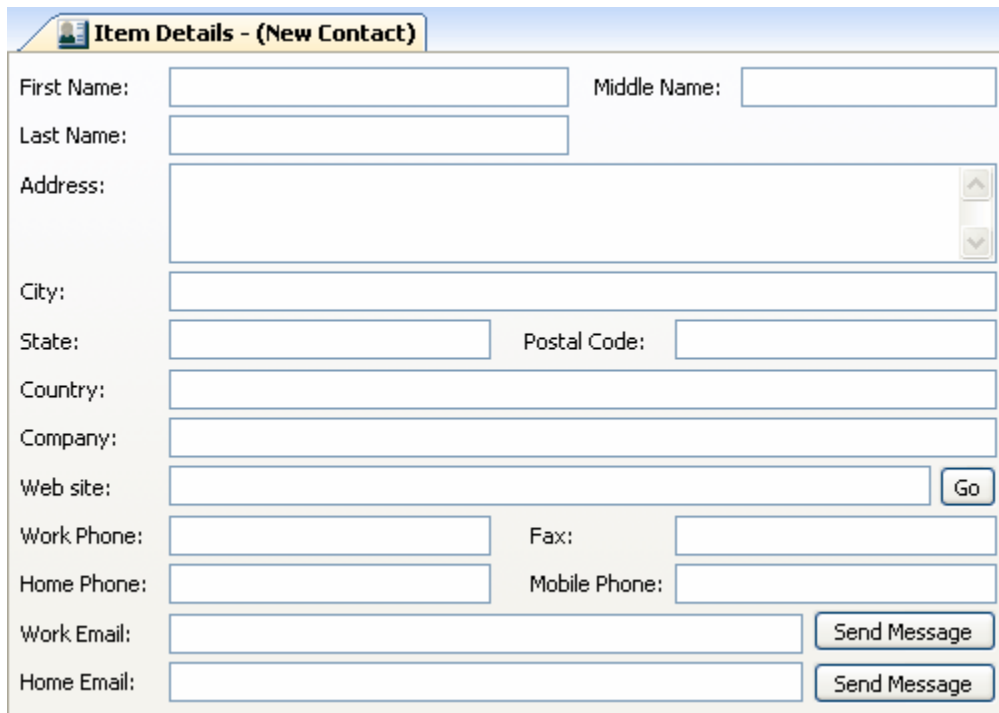
By default, the Internal Browser View is used to view and edit web content such as web pages, .mht files, and icons. If Microsoft Office applications (such as Microsoft Word, Excel, Powerpoint, etc) and/or a PDF Reader is installed, these additional document types can also be viewed and/or edited within Ultra Recall with the following configuration setting changes.

See Also:
- Web Toolbar
- View Toolbar
- Format Toolbar
- Browser Options
- Keyboard Shortcuts
- Internet Browser Mode
- Editing Web Pages Internally
- Editing Microsoft Office and PDF Documents Internally
- Windows Explorer Mode

4.3.4.2   Contact Editor

Whenever Info Items based on a *Contact* Template are selected, the Item Details Pane will display the **Contact Editor** to facilitate viewing and modifying the various *Contact* related Attributes assigned the Info Items.

Pressing *Ctrl+Shift+C* (or *Edit | Copy Mailing Address* on the Menu Bar) will copy the formatted name and address information onto the clipboard.

Notes:
- All Attributes values can also be modified in the Item Attributes Pane.
- Additional Attributes can be assigned that while not displayed in the Contact Editor, can be viewed and modified in the Item Attributes Pane.
- The Contact template can also be modified to use a custom user-defined form instead of the built-in Contact form.

See Also:
- Keyboard Shortcuts
- Global Keyboard Shortcuts

4.3.4.3   Form Viewer

Whenever Info Items based on a Template having a Form attribute are selected, the Item Details Pane will display the **Form Viewer** to view and modify the item Attributes assigned the Info Items.

The **Form Viewer** will also include the item's detail viewer (for the item's text, document, web page, etc.) below the form.

Notes:
- Attributes values can also be modified in the Item Attributes Pane.
- Forms are available in the Professional and Viewer edition only.

See Also:
- Form Attribute
- Forms Editor
- Form Properties dialog
- Item Details Pane

4.3.4.4   Rich Text Editor

When an Info Item in Ultra Recall contains rich text, the **Rich Text Editor** will display the data and allow editing of rich text, internal links to other Info Items, and external hyperlinks.

The Format Toolbar and Format submenu of the Item menu can be used to format rich text in the **Rich Text Editor**.

The **Rich Text Editor** version of the Item Details Pane:

Item Details - Benefits

Ultra Recall will benefit users in many ways:

- Centralized organization of *all* your data
- The ability to annotate even read-only data
- Efficient, dependable retrieval of your information on demand
- Web data available off-line
- Encryption available for sensitive information
- Easy backup, restore and migration
- Many, many more!

Try it today!
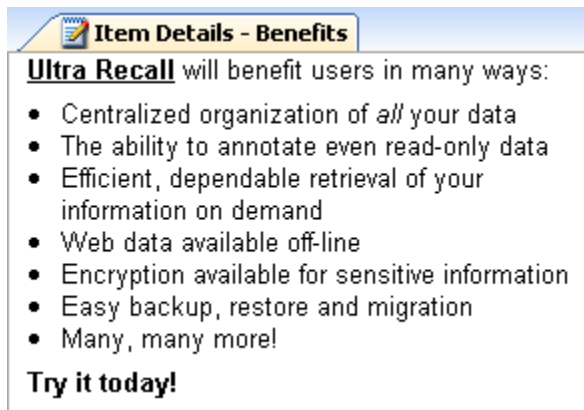
Related Toolbars:
- Format Toolbar
- Editor Options
- Number Format Dialog
- Insert Table Dialog
- Text Style Dialog
- Keyboard Shortcuts
- Text Formatting Keyboard Shortcuts
- Internal Linking

4.3.4.5   Mime (Email) Viewer

Ultra Recall can display message Info Items in the **Mime Viewer** version of the Item Details Pane. The **Mime Viewer** provides read-only access to email/mime content. This is configured by adding .msg (for Outlook messages) or .eml and .nws (for Outlook Express, Windows Mail, Windows Live Mail, Thunderbird, and Postbox messages) to the MIME viewer document option.

Note: In the Professional edition, version 4 and later, the default behavior is to use the Form Viewer and a child Rich Text or Browser view to display messages. This is configured by adding .msg (for Outlook messages) or .eml and .nws (for Outlook Express, Windows Mail, Windows Live Mail, Thunderbird, and Postbox messages) to the *File extensions to display in text editor* Editor option or *File extensions to display in internal browser view* Browser option. The provides enhanced formatting of the message contents.
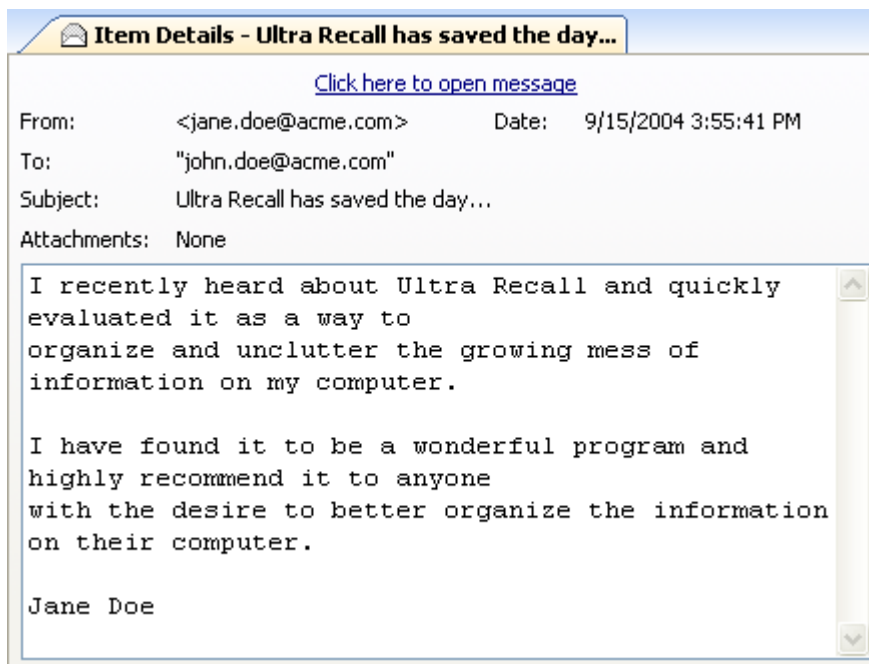
See Also:
* Keyboard Shortcuts
* Global Keyboard Shortcuts
* Document Options
* Browser Options

4.3.4.6   Search Criteria Editor

Whenever a **Search** Info Item is selected, the Item Details Pane will display the **Search Criteria Editor**.

Here the **Search Criteria Editor** is displayed in Quick Search mode:
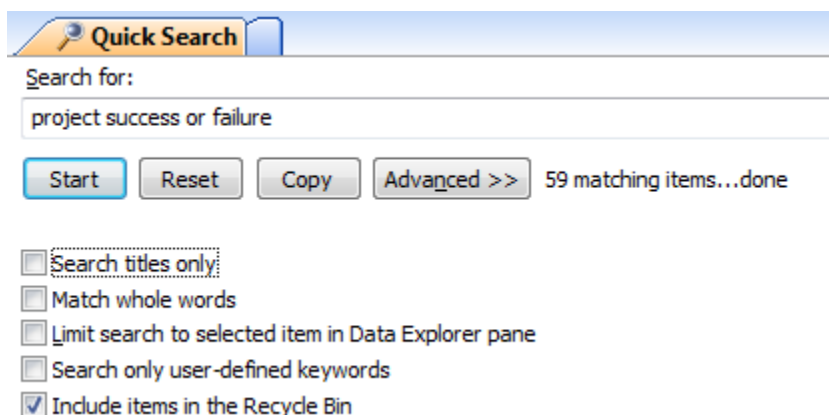
Here the **Search Criteria Editor** is displayed in Advanced Search Mode:

See Recalling Information, Quick Search, Advanced Search for more information about Searching in Ultra Recall.

4.3.4.7 Text Document Editor

For plain text Info Items (ie. an Info Item for a .txt file), Ultra Recall will display (and allow editing) in the **Text Document Editor** component of the Item Details Pane.

A syntax coloring text editor can also be used to edit text and source code files by enabling the related editor option. The syntax coloring will be based on the extension of the item's URL attribute. In addition to syntax coloring, the editor also provides code folding, auto-completion (Ctrl+Space), bookmarks, line numbers, and more. Definitions for other languages can be created using this documentation, saving with a .schclass extension, and copying the file to the Editor\Schemas subfolder of the Ultra Recall installation path.

Below is the **Text Document Editor**:

See Also:
- Keyboard Shortcuts
- Editor Options
- Global Keyboard Shortcuts
- Text Formatting

4.3.4.8 Image Viewer

Ultra Recall will display image-type Info Items in the **Image Viewer** version of the Item Details Pane.

The following *types* of images can be displayed directly in the **Image Viewer** version of the Item Details Pane:

- *.gif
- *.jpeg
- *.jig
- *.tif
- *.tiff
- *.bmp
- *.dib
- *.jpg
- *.eps
- *.tga
- *.pct
- *.wmf
- *.emf
- *.rel

See Also:
- Keyboard Shortcuts
- Document Options
- Global Keyboard Shortcuts

4.3.4.9 Other

When an Info Item contains information that Ultra Recall does not provide a specific viewer for, Ultra Recall will show a blank viewer with a hyperlink that can be used to view/edit the information in the application associated with this type of data on your system.
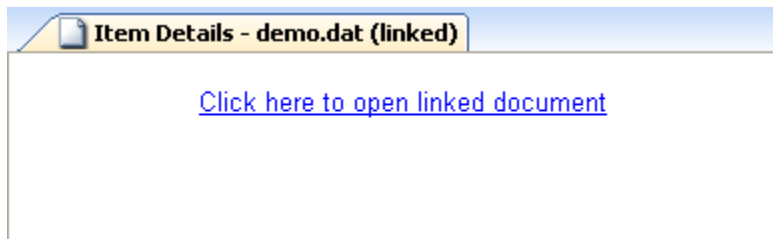
If the document is stored in Ultra Recall, then two hyperlinks could be displayed, one for the linked document (if the *URL* attribute has a valid URL) and one for the stored document.

Or, if the document's file extension is included in the user option to *Show item text for documents with no viewer* and Ultra Recall can parse the document's text, the document text will be displayed read-only in the text editor. In this case, the document can also be edited externally.

4.3.5   Related Items Pane

The **Related Items Pane** is a grid type display of Info Item Attribute values. Which Info Items are displayed depends on which *Primary* Selection Pane is current and what is selected in the *Primary* Selection Pane. To go to the Related Items pane, select *View | Child Items* or *View | Search Results* on the menu or press Ctrl+3.

Primary Pane	Primary Pane Selection	Related Item Pane Caption
Data Explorer Pane	Single	*Child Items*
Data Explorer Pane	Multiple (links to same Item)	*Child Items*
Data Explorer Pane	Multiple (different Items)	*Selected Items*
Search Pane	Single	*Search Results*
Search Pane	Multiple	*Selected Items*

Customization: The **Related Items Pane** is highly configurable. You can resize the columns, add or remove columns (one per Attribute), and sort the data displayed on the values of one or more columns . Much of this customization can be done directly on the columns of pane via the header row (right-click to access some features), or via the Choose Columns ... Dialog.

Customization Persistence: As you customize the **Related Items Pane**, your layout is persisted as the "view" for the currently selected Info Item. You can update the default, reset to default and more.

How to access:
· Menu Bar: *View | Child Items* or *View | Search Results*
· Keyboard: *Ctrl+3*
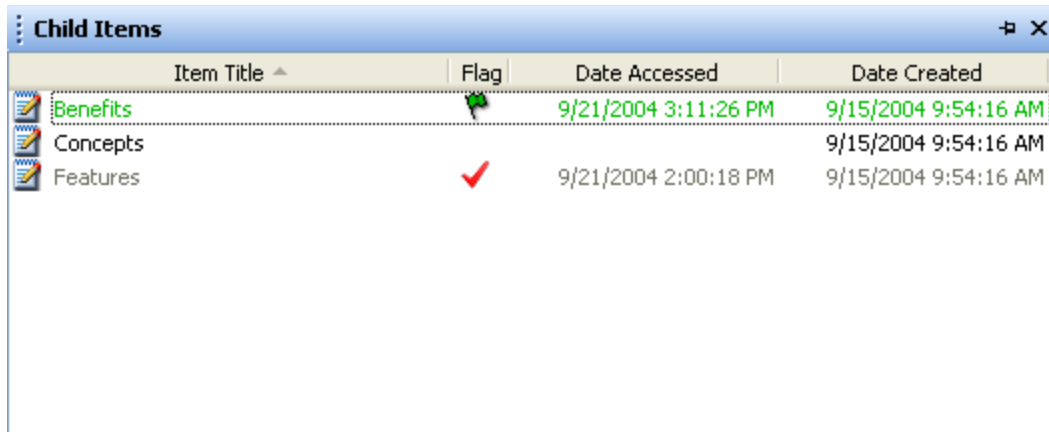
See Also:
· Customization
· Customization Persistence
· Keyboard Shortcuts
· Global Keyboard Shortcuts

- Panes
- Copy and Paste to other applications
- Drag and Drop to other applications

4.3.5.1 Customization

The grid displayed in the Related Items Pane is highly configurable. You can add or remove columns, change their widths, sort (including multiple column sort) and rearrange them.

The image above shows four columns displayed, with the first column (*Item Title)* being sorted.

Add/Remove Columns: To add and/or remove columns from the Related Items Pane, click on *View | Choose Columns...* (or right click on the header of the Pane and check/uncheck). If you right-click the header of the Pane, you can deselect or select Columns or you can click on *More...* to use the Choose Columns Dialog. From the Choose Columns Dialog you can select which columns to display, their order in the grid and their width.

Changing Column Widths: You can change columns widths directly by sliding the divider between columns in the header.

Reordering Columns: You can re-order the columns by dragging (using the column header) to the desired column position.

Sorting Attribute Data: You can sort the Related Items Pane on the values for one or more columns. Sorting is accomplished by clicking the header of the column you desire to sort. When a column is sorted, an arrow is displayed indicating the sort direction (clicking the header again will reverse the sort). You can also sort on multiple columns by holding the *Ctrl* key while clicking the multiple columns for sorting. When sorting on multiple columns, a number is displayed next to the direction arrow indicating the column sort order.

Customization Persistence: As you make changes to the layout of the Related Items Pane, Ultra Recall "remembers" the configuration and associates it with the selected Info Item (only if a **single** item is selected). Read the Customization Persistence section for more information on changing or restoring the default layout of the Related Items Pane.

See Also:
- Choose Columns Dialog
- Configuration Persistence
- Related Items Pane

4.3.5.2   Customization Persistence

Default Configuration: The template of an Info Item determines the default "layout" of the Related Items Pane when it is displayed (only when a single Info Item is selected in a Primary Selection Pane).

"Layout" Persistence: When the layout of an Info Item is customized, Ultra Recall remembers the layout you define, and associates it with the selected Info Item. When you later re-select this Info Item, the Related Items Pane will show the child Info Items (or Search Results if the selected Info Item is a Saved Search) using this same "layout".

Changing the Default Related Items Pane layout for a template:
- **Directly:** You can simply select the desired Template Info Item in the Data Explorer Pane, then customize the Related Items Pane as desired.
- **From a Item based on the Template:** If you have already customized the Related Items Pane layout of an item and wish to make its layout become the default for its template, you can simply right-click on the header row of the Related Items Pane, then click on *Set as   Default*. This will update the template (and all items based on it using the default layout) to the displayed Related Items Pane layout.

Reverting a customized layout back to the default: Right-click on the header row of the Related Items Pane, and choose *Restore to Default*. This will discard any customizations previously done to the Related Items Pane for the selected Info Item, and restore it to the layout defined by the assigned Template.

See Also:
- Related Items Pane
- Customization
- Choose Columns Dialog

4.3.6   Item Attributes Pane

The Item Attributes Pane is the pane that displays and allow editing of the Attributes for the Selected Info Item(s) (specified by the current *Primary* Selection Pane). To go to the Item Attributes pane, select *View | Other Windows | Item Attributes* on the menu or press Ctrl+4.

Each row is a single attribute name/value pair. New Attributes can be assigned to the selected Info Items(s), and non-mandatory Attributes can be deleted from the selected Info Item(s).

Here the **Item Attributes Pane** is shown in its default location, docked together with the Item Notes Pane.

Each Attribute displayed with the **Item Attributes Pane** is defined with an Attribute Type. Several Attribute Types use special editors in the *Value* column to facilitate viewing and editing. These editors are described under their respective help entries in the Attribute Types help section.

While *URL* values are simply strings, and are stored in Attributes using the String Attribute Type, several additional features are provided related to these special strings:
* Any *URL* Attribute value is converted to a path relative to the Info Database path whenever possible. This is a convenient feature that makes moving of Info Databases and linked documents in the same or nested folders much simpler.
* Any *URL* specified in an Attribute can easily be launched by selecting that Attribute, then using the Open Shortcut keyboard shortcut (*Ctrl+Q* or *Ctrl+Shift+Q*).
* *URLs* can be dropped onto any String Attribute in the **Item Attributes Pane** and the *URL* will be pasted as that Attribute's value.

Note: You can resize the Attribute column width using *Ctrl+Left* and *Ctrl+Right* respectively when this Pane has focus. You can turn the header in this Pane on or off via *View | Show Header.*

How to access:
* Menu Bar: *View | Other Windows | Item Attributes*
* Keyboard: *Ctrl+4*

See Also:
* Keyboard Shortcuts
* Global Keyboard Shortcuts
* Attribute Options

4.3.7   Item Notes Pane

When you want to add Item Notes to an Info Item, you enter and format this information in the **Item Notes Pane**. To go to the Item Notes pane, select *View | Other Windows | Item Notes* on the menu or press Ctrl+5.

Below is the **Item Notes Pane** in the default location (docked with the Item Attributes Pane):
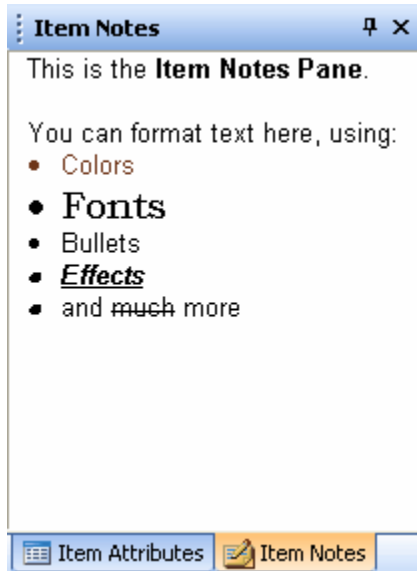
You can format any text entered here the same way as the Rich Text Editor.

How to access:
- Menu Bar: *View | Other Windows | Item Notes*
- Keyboard: *Ctrl+5*

See Also:
- Keyboard Shortcuts
- Global Keyboard Shortcuts

4.3.8   Item Parents Pane

The Item Parents Pane is the pane that displays the list of logically linked **parents** for the selected Info Item(s) (specified by the current *active* Selection Pane). To go to the Item Parents pane, select *View | Other Windows | Item Parents* on the menu or press Ctrl+6.

Here the **Item Parents Pane** is shown docked, with a single parent being displayed.

Ancestors of an item (grandparent items back to the root) can be viewed by expanding the items in the tree. A parent or ancestor item can be selected by double-clicking that item or pressing Enter after selecting it.

Note: Parents of the selection in the active Selection Pane will be bold in the Item Parents Pane.

How to access:
- Menu Bar: *View | Other Windows | Item Parents*
- Keyboard: *Ctrl+6*

See Also:
- Logical Linking
- Selection Panes

4.3.9   How the Panes Work Together

Each Pane available in Ultra Recall serves a specific purpose. By default, they are all visible and docked to the main Ultra Recall application. Some of these Panes are Selection Panes; the others are Dependent Panes.

Which Info Items are selected in a Selection Pane determines what is displayed in all the Dependent Panes. Only one Selection Pane can be active at one time; the active Selection Pane will have its selection visible.

4.3.9.1   The Selection

When one or more Info Items are selected in a Selection Pane, the selected Info Items are **Active** and the Dependent Panes reflect their respective characteristics of these Info Items.

When selection is made in a Selection Pane, Ultra Recall indicates this by highlighting these Info Items .*

* Selection is highlighted in the Web Toolbar by simply displaying a URL. Whenever a URL is present in this toolbar it is the active Selection Pane.

In this image, the selection is in the Data Explorer Pane:
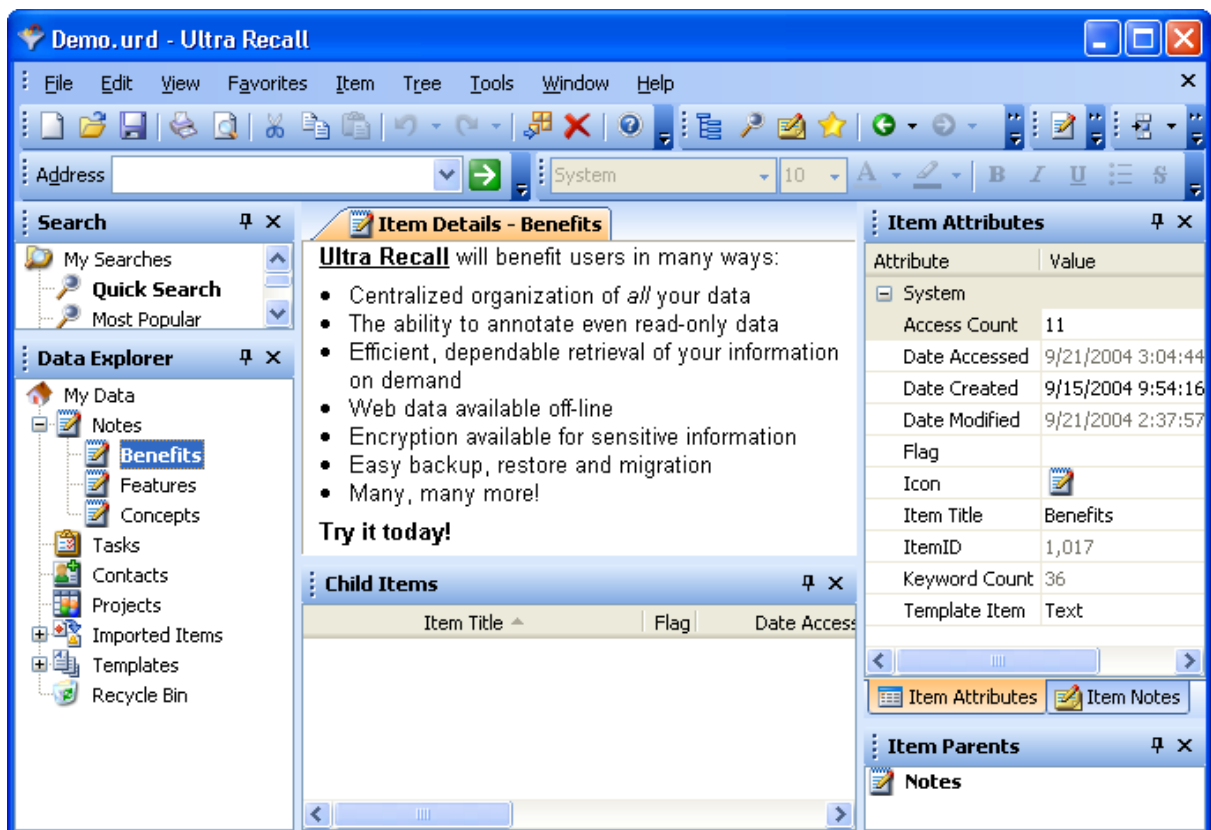
In this image, the selection is in the Related Items Pane:
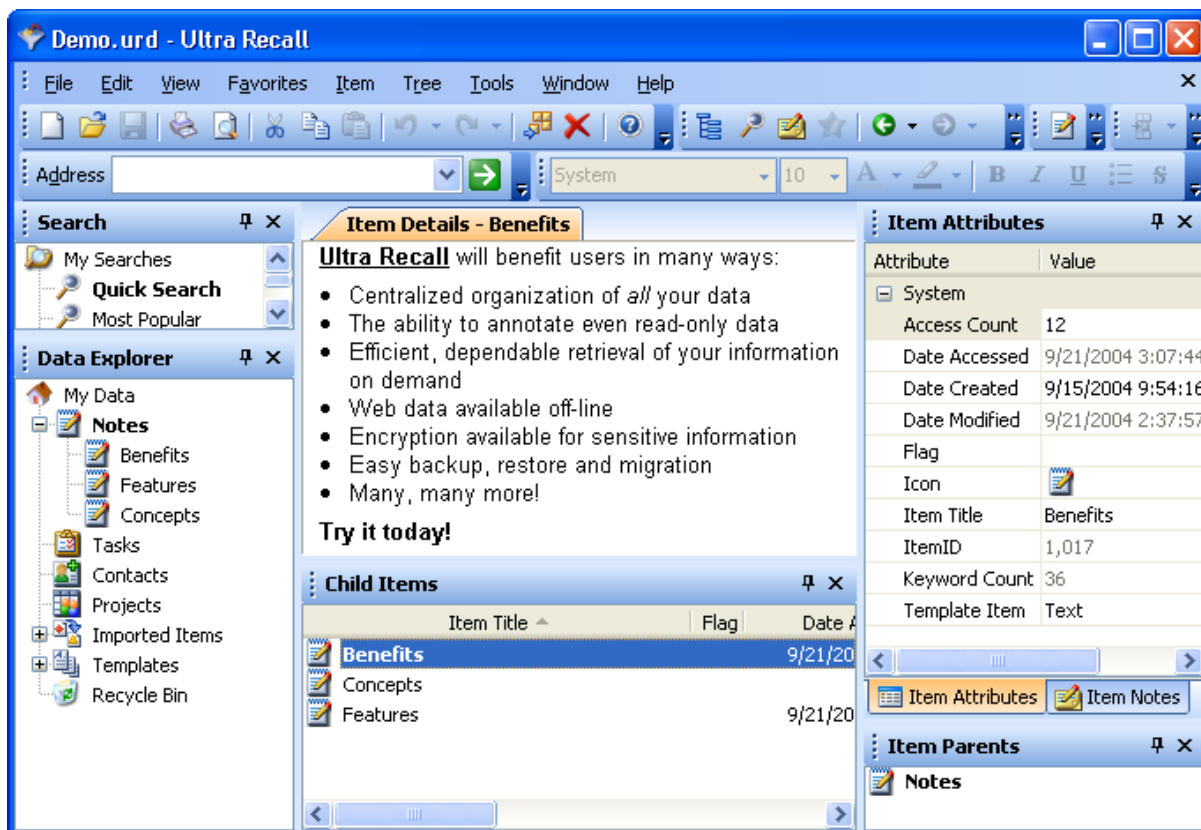
In this image, the selection is in the Web Toolbar:
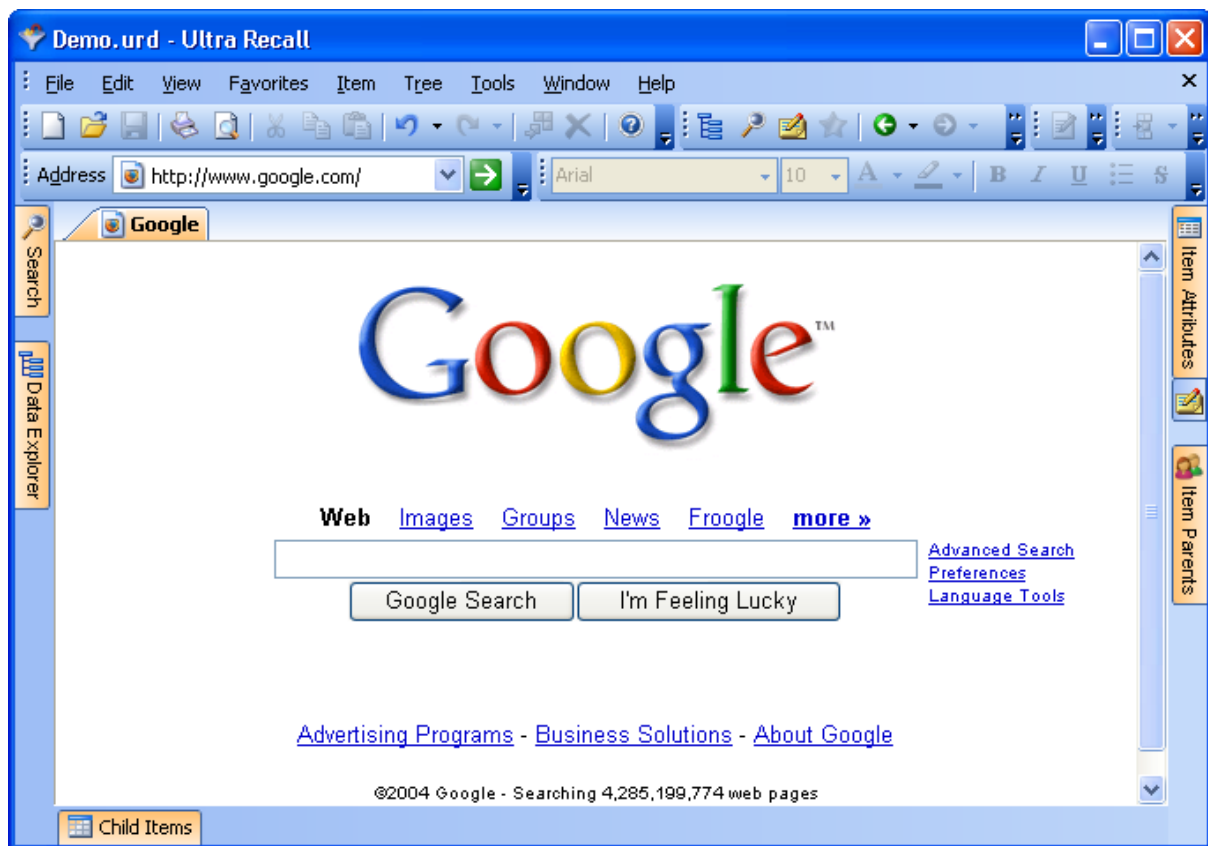
4.3.9.2 Selection Panes

The **Selection Panes** are the places in Ultra Recall that drive what content is displayed throughout the application. Only one of these **Selection Panes** can be **active** at one time, and the **active** Pane will have its selection visible (highlighted).

The **Selection Panes** include:
- Data Explorer Pane
- Search Pane
- Related Items Pane *
- Web Toolbar †

* This Pane functions as a Dependent Pane unless one or more Info Items (rows) are selected here, then it temporarily functions as a **Selection Pane**
† this isn't technically a Pane, but when it is displaying a URL, it functions as a **Selection Pane** (it is **active** whenever it contains a *URL*)

4.3.9.3 Dependent Panes

When Info Items are selected in a Selection Pane, the **Dependent Panes** will update their content to reflect the different characteristics of these selected Info Items.

The **Dependent Panes** include:
- Item Details Pane *
- Item Attributes Pane
- Item Notes Pane

- Item Parents Pane
- Related Items Pane †

* this is the only Pane that can't be undocked, hidden, or repositioned. It is always displayed; it is the Pane that displays and/or edits the primary data of the Info Item.

† this Pane functions as a **Dependent Pane** except when one or more Info Items (rows) are selected in this Pane, while the selection is in this Pane, it functions as a Selection Pane.

4.3.10 Customizing

While the Default Layout of Ultra Recall displays all the Toolbars and Panes that are available, the entire application (including most Panes*) can be highly **customized** to suit your particular needs.

Panes† can be configured in a manner similar to Toolbars (repositioned and/or undocked), but the repositioning is even more flexible and sophisticated, with the additional features of Resizing, Auto Hide, maximizing, and restoring also available.

Notes:
- Customizations should be performed with only one database open, and exit and restart Ultra Recall after customizing.
- Pane customizations are stored in the user's application data folder (`%APPDATA%\Kinook Software\Ultra Recall` or `C:\Documents and Settings\<username>\Application Data\Kinook Software\Ultra Recall`). To reset all pane customizations to their defaults, exit Ultra Recall and delete all `Layout*.dat` files in the above folder.

* Every Pane except the Item Details Pane can be Auto hidden, Undocked and/or Closed.

4.3.10.1 Resize Panes

Every Pane can be **resized** using the splitters that are displayed around the inner perimeters of each Pane (when docked). Panes can be **resized** like a normal window when undocked*.

* Every Pane except the Item Details Pane can be undocked.

See Also:
- Pane Customization
- Layouts
- Reposition Panes

4.3.10.2 Reposition Panes

Any docked pane can be **repositioned** by docking the Pane* at a different location in the Ultra Recall application.
 * Every Pane except the Item Details Pane can be undocked.

Dragging a Pane around the Ultra Recall application will display an *outline* of the **docking** region that will be used when the Pane is dropped. If the Pane is dropped at a location that a **docking** *region* is not *outlined*, or outside of the Ultra Recall window will result in the Pane becoming undocked.

Below is an image showing the various pane docking/repositioning "cues" and how to use them:
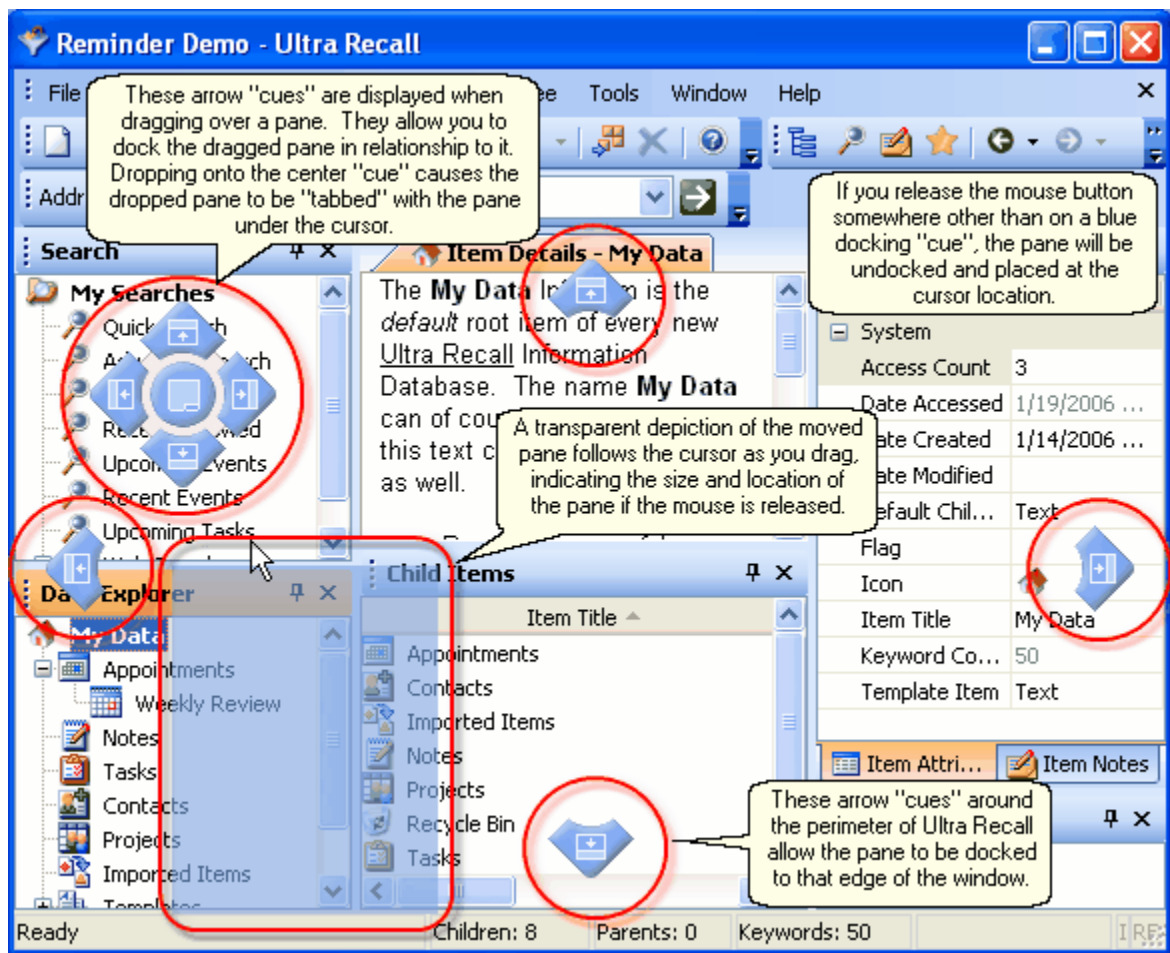
Note: If you begin repositioning by dragging a pane (either intentionally or accidentally), you can cancel the operation by hitting the Esc key before releasing the mouse button.

See Also:
- Docking/Undocking Panes
- Layouts
- Resizing Panes

4.3.10.3 Auto Hide Panes

Auto hide is a feature that will automatically **hide** or "shrink" a pane to the perimeter of the application until it is needed.

How to toggle a docked pane's **Auto hide** mode:
1.   click the Auto Hide button

- When Auto hide is OFF: 🠗
- When Auto hide is ON: 🠗

How to **display** (expand) an **Auto hidden** pane:
1.   hover the mouse over the *tab* for the pane
2.   click the menu item for that pane
3.   type its keyboard shortcut

Hiding an pane in **Auto hidden** mode:
1.   Change the focus to a different pane

Note: This feature can make Ultra Recall very usable even on a display with a limited resolution.

See Also:
· Close Panes
· Pane Customization

4.3.10.4 Docked/Undocked Panes

Most Ultra Recall Panes* can be **docked** around the entire perimeter of the Ultra Recall application, or even **undocked** (floating) and moved anywhere on the screen.
* Every Pane except the Item Details Pane can be undocked.

When a Pane is undocked, it will have a caption bar and can be placed outside of the Ultra Recall application window, otherwise it has no caption bar and is *snapped into* the Ultra Recall window.

See Also:
· Pane Customization
· Repositioning Pane
· Resizing Panes
· Layouts

4.3.10.5 Close Panes

Most Ultra Recall Panes* can be **closed** by clicking the ✕ button displayed in the upper right corner or typing Shift+F4.

To **display** a **closed** pane, simply navigate to that Pane using the Menu Bar entry or press the related Keyboard Shortcut.

* Every Pane except the Item Details Pane can be closed.

See Also:
· Auto Hide Panes
· Pane Customization

4.3.11 Pane Shortcuts

The following default keyboard **shortcuts** are available for accessing each Pane:
· Ctrl+0 = Search
· Ctrl+1 = Data Explorer
· Ctrl+2 = Item Details
· Ctrl+3 = Related Items (*Child Items / Selected Items / Search Results*) *
· Ctrl+4 = Item Attributes
· Ctrl+5 = Item Notes
· Ctrl+6 = Item Parents
· Alt+C = Calendar

· Ctrl+Tab = Next Pane
· Ctrl+Shift + Tab = Previous Pane
· Tab = Next control or next pane
· Shift+Tab = Previous control or previous pane

* These are the different captions of the Related Items Pane. The caption reflects what the source of the data is. See Related Items Pane for details.

See Also:
- Keyboard Shortcuts
- Panes

4.4 Layouts

An arrangement of panes is referred to as a **Layout**. Up to six different **layouts** are available, and each layout can be configured to suit a particular need. Layout 1 is the *normal* configuration of the Ultra Recall application. Layout 2 is typically a less frequently used **Layout** for an alternative purpose (its initial configuration is a Full-Screen type **layout**).

The default keyboard shortcut to toggle between the first two **Layouts** is *F11;* the default shortcut for the next two layouts is *F12.* Switching layouts via the menu is accessed at *View | Layout.*

Note: Customized layouts are stored in the user's application data folder (`%APPDATA%\Kinook Software\Ultra Recall` or `C:\Documents and Settings\<username>\Application Data\Kinook Software\Ultra Recall`). To reset all layouts to their defaults, exit Ultra Recall and delete all `Layout*.dat` files in the above folder.

4.5 Dialogs

4.5.1 About

The **About dialog** is accessed by choosing **About** from the *Help* menu. It displays program version, database version, copyright, and license information.

The dialog contains a Register button for entering product registration information received after licensing Ultra Recall. When the evaluation period has expired, the product cannot be used until it has been licensed and registered. After purchasing, click the Register button and follow the directions for turning the evaluation version into a licensed version.

How to access:
- Menu Bar: *Help | About*

4.5.2 Attributes

The complete list of defined Attributes is managed with the **Attributes Dialog**.

Each Attribute has a unique name and several properties that can be modified using this **dialog**.
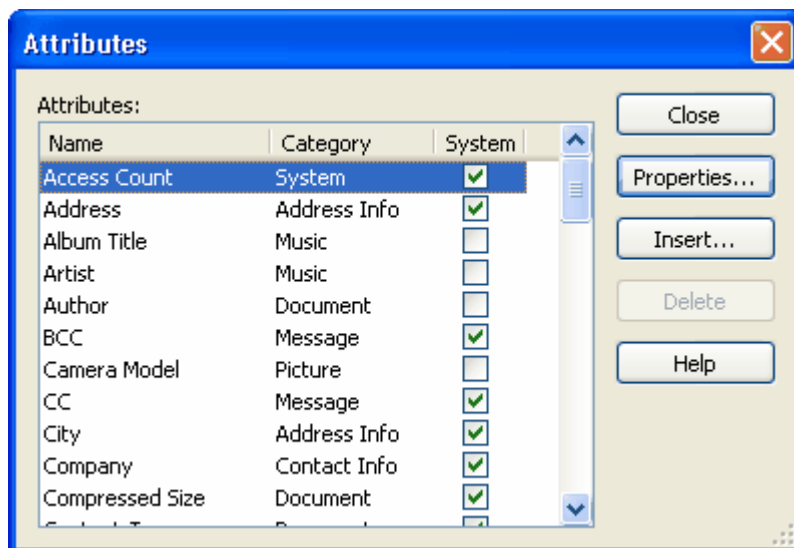
The following buttons are provided to manage the list of Attributes:
- **Properties:** Click this button (or use the *Enter* key) to view/edit the properties of the selected Attribute
- **Insert:** Click this button (or use the *Insert* key) to create a new attribute
- **Delete:** Click this button (or use the *Delete* key) to delete an existing attribute

Notes:
- Attributes marked as System are pre-defined and can not be deleted.
- Creation and modification of custom attributes is available in Professional edition only.
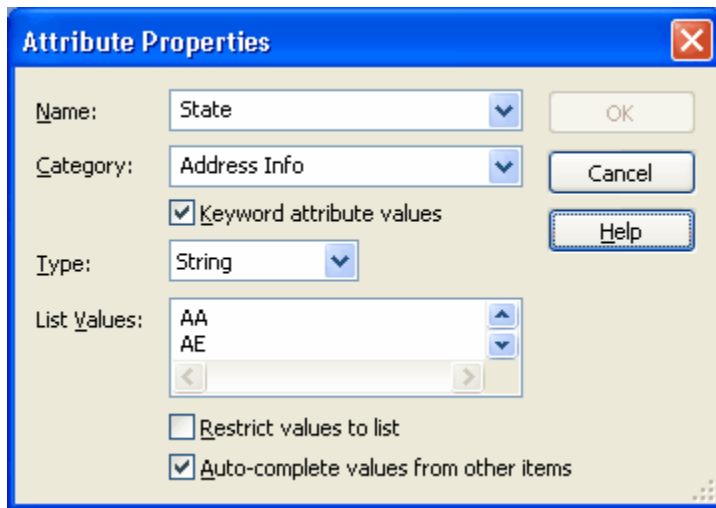
How to access:
- Menu Bar: *Tools | Attributes...*

See Also:
- Attribute
- Attribute Type
- Item Attributes Pane
- Attribute Properties

4.5.3 Attribute Properties

The **Attribute Properties Dialog** is used to edit the properties of individual Attributes.

Name: The name of each attribute must be unique.

Category: You can select an existing category from the list or enter any category name of your choice.

Keyword attribute values: If this box is checked, Ultra Recall will add all automatically generated keywords based on the relevant text of the values assigned to this Attribute.

Type: Select the Attribute Type for this particular Attribute.

List Values: Values added here (one per line) are available as entry choices in a drop-down for this Attribute when displayed in the Item Attributes Pane.

Restrict values to list: If *List Values* are provided, checking this box will restrict entry to the values specified. If not checked, users can enter any value manually in addition to choosing from the values provided.

Auto-complete values from other items: If this box is checked, this field will auto-complete from the values assigned to this Attribute for all Info Items.

Allow multiple selection: If *Restrict values* is checked, checking this box will allow the user to select multiple values for the attribute.

How to access:
· Click the *Properties* or *Insert* button from the Attributes Dialog

Note: Creation and modification of attributes available in Professional edition only.

4.5.4 AutoCorrect Options

The AutoCorrect Options Dialog is used to configure auto-correction behavior within the Text editor.
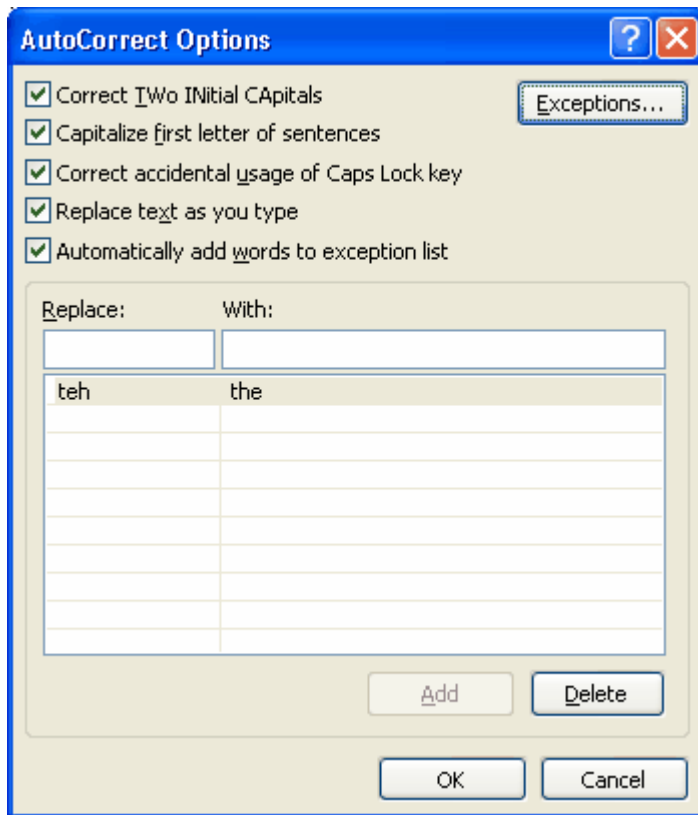
Correct Two Initial Capitals: Checking this box will command Ultra Recall to automatically correct any word starting with two initial capital letters.

Capitalize first letter of sentences: Checking this box will command Ultra Recall to automatically capitalize the first character of each entered sentence.

Correct accidental usage of Caps Lock key: This checkbox is self-explanatory.

Replace text as you type: Checking this box will command Ultra Recall to automatically replace text using the table below in the **AutoCorrect Options Dialog**. You can easily add or delete replacement values with the *Add / Delete* buttons below the table.

Automatically add words to the exception list: If this option is checked, Ultra Recall will automatically add words to the exception list if user pressed *Backspace* just after **AutoCorrection** occurs.

Exceptions button: Shows the *Exceptions Dialog* allowing user to view/edit the exceptions to the auto correction of text.
Note: The exceptions you define are stored in a file named *Spelling.act* located in the user's Ultra Recall data folder (typically *C:\Documents and Settings\<UserName>\Application Data\Kinook Software\UltraRecall*).

How to access:
- Menu Bar: *Tools | Auto Correct Options*

· Keyboard: *Shift+F*

4.5.5 Change Password

The **Change Database Password Dialog** is used to encrypt or unencrypt an Info Database. This is as simple as providing the existing password (if already encrypted) and a new password (enter a blank password to unencrypt an encrypted Info Database). To ensure you enter the new password correctly, you must enter it identically in the last two fields.

WARNING! Store your password in a safe place. The password is **not recoverable** if you forget it.

How to access:
· Menu Bar: *Tools | Change Password...*

Note: Available in Professional edition only.

4.5.6 Choose Columns

The Related Items Pane displays some of the attributes for the Info Items it is displaying. The list of attributes displayed is edited with the Choose Columns Dialog.

Each checked column will be displayed. When a column is selected, you can move it up or down with the *Move Up* and *Move Down* buttons, and change the column width in the *Selected Column width* text box.
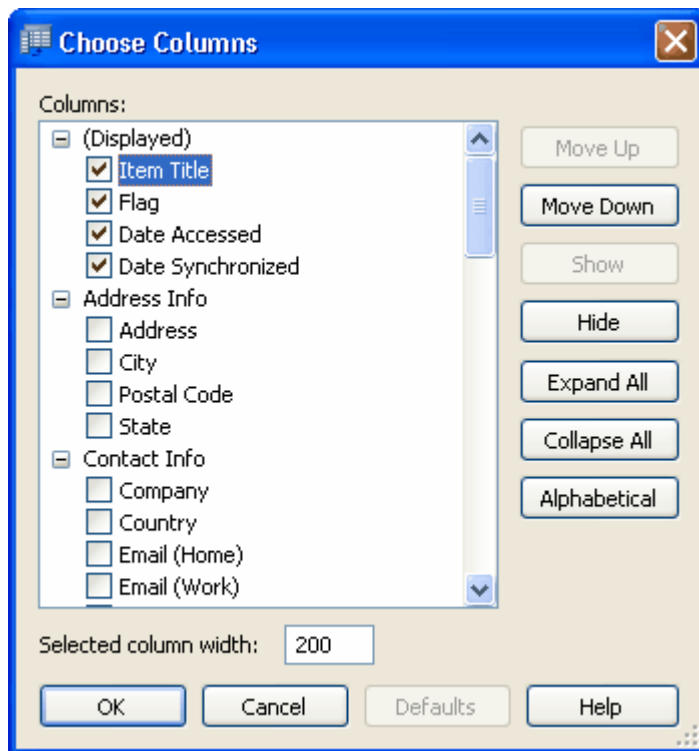
The column choices (the Attributes defined in the Info Database) can be displayed categorized or alphabetized. This setting is toggled with the button which is either labeled Alphabetized or Categorized (indicating how it will be displayed when clicked).

How to access:

- Menu Bar: *View | Choose Columns...*
- Keyboard: *F9*
- right-click the header row of the Related Items Pane, then click *More...*

See Also:
- Related Items Pane
- Related Items Pane Configuration

4.5.7   Compact and Repair

Access the **Compact and Repair Database Dialog** is available by selecting **Compact and Repair** from the *Tools* menu.

Compact database: If this check box is checked when *OK* is clicked, the current Info Database will be shrunk, removing any free space.

Note: Ultra Recall uses a highly efficient, binary format for Info Database files. As Info Items are deleted, empty space remains within the file, and is reused when new data is added to the Info Database. If you delete a large amount of data, you can immediately shrink the Info Database, removing this free space by using the provided **Compact** functionality.

Repair database: The Ultra Recall database uses high-performance technology and has been extensively tested and optimized. The underlying technology is atomic and transactional, preserving the integrity of your data at all times (even through power loss or equipment failure). By checking the **Repair** database checkbox, when you click *OK*, Ultra Recall will verify the integrity of your Info Database, and fix any of the options checked below.

Reset all system information to defaults: Checking this box will ensure that the system defaults for all system Info Items, Attributes, Related Items Pane layouts will be reset to the default values.

Recalculate computed values: This indicates that internally computed values will be recomputed and verified during the Repair action.

Recover orphaned items: This indicates that Ultra Recall will ensure that no Info Items have somehow become orphaned (not parented to at least one other Info Item). In the unlikely event that an orphaned Info Item is detected, a new Info Item will be created and the orphaned Info Items will be parented there.

Enable full-text search enhancements: If checked, full-text search enhancements will be enabled. If unchecked, the enhancements will be disabled. This option is available for backward compatibility with existing databases (before full-text search enhancements were available). The database version in the About dialog will also be suffixed with *[FTS]* if full-text search enhancements are enabled.

Notes:
- The above operations may take a long time with large database files.
- Always backup the database file first.

How to access:
- Menu Bar: *Tools | Compact and Repair...*

4.5.8   Customize

The Customize dialog is used to customize toolbars, menus, keyboard shortcuts, and the visual appearance of Ultra Recall.
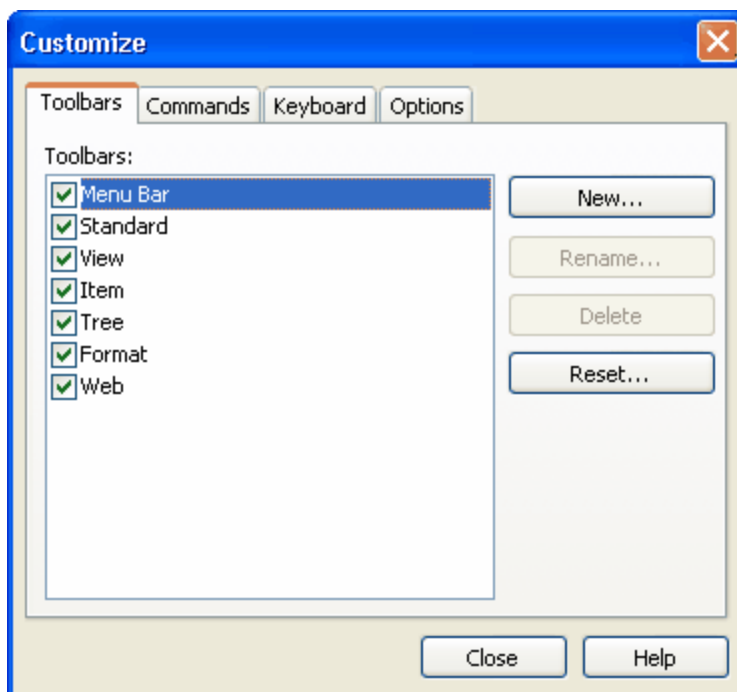
- Toolbars

- Commands
- Menus
- Keyboard
- Options

You display this dialog in Ultra Recall by:
1) From the Menu Bar: click *Tools | Customize*
2) Right-click any displayed Toolbar, then click on *Customize* in the displayed menu

4.5.8.1 Toolbars

The Toolbars tab of the Customize dialog is used for creating, deleting, renaming, showing, and hiding toolbars and menus in Ultra Recall.

- Click the checkbox next to a toolbar to show or hide that toolbar.
- Click the buttons to create, rename, or delete toolbars.
- To restore the defaults for a toolbar or menu bar, select the menu or toolbar in the list and click Reset.

Note: The menu bar cannot be hidden, renamed, or deleted.

How to access:
- Menu Bar: *Tools | Customize...*

4.5.8.2 Commands

The Toolbars tab of the Customize dialog can be used to modify the Ultra Recall menus and toolbars.

- To remove an existing menu item or toolbar button, click and drag the item or button and drop it outside of the menu or toolbar.
- To add a new button or menu item:
  1. Select the category of the command you want to add (use All Commands if unsure).

2.   Drag and drop the command onto the target toolbar or menu.

Note: Menus and toolbars can also be customized without displaying the Customize dialog by holding the Alt key while dragging menu items and toolbar buttons to move them to another location.

4.5.8.3   Menus

The Menus tab of the Customize dialog can be used to modify the Ultra Recall context (right-click) menus.

- Select a context menu to customize.
- To reset the menu to the defaults, click Reset.
- To remove a menu item, drag and drop the menu item out of the menu.
- To add a menu item:
  1.   Switch to the Commands tab.
  2.   Select the category of the command you want to add (use All Commands if unsure).
  3.   Drag and drop the command onto the context menu.

4.5.8.4   Keyboard

The Keyboard tab of the Customize dialog is used to view and customize the keyboard shortcuts associated with commands. To view the key assignment(s) for a command, first choose the category and command. To assign a new shortcut, type the shortcut key into the 'Press new shortcut' field and click Assign. To remove an assignment, select its assignment and click Remove. Click Reset All to restore all keyboard shortcuts to the default values.

Note: The currently assigned keyboard shortcut for each command is also displayed on the menu bar and in the command's toolbar tool tip if the related option is enabled.

4.5.8.5   Options

The Options tab of the Customize dialog configures global options related to toolbars and the menu bar:

Always show full menus: Checking this box will ensure all menu items are always displayed when a menu is selected. If not checked, the application will initially only show the menu items that have been recently viewed.

Show full menus after a short delay: If this box is checked (and enabled), full menus will be displayed after a short delay. If this box isn't checked, the only way to see the full menu is to click the bottom Expand button displayed with each personalized menu (this button disappears when the full menu is displayed).

Paint theme: This combo box allows you to select one of several available themes that the visual appearance of the application.

Large icons: Checking this box will show larger than normal toolbar and Menu Bar icons.

Show ScreenTips on toolbars: When this box is checked, tool tips will be displayed when the mouse is hovered over toolbar buttons.

Show shortcut keys in ScreenTips: When this box is checked (and enabled), button tool tips will include the associated keyboard shortcuts for commands that have a shortcut.

Menu animations: Specifies the animation effect to use when displaying menus.

4.5.9 Database Properties

The **Database Properties Dialog** displays statistics and properties about the current Info Database.
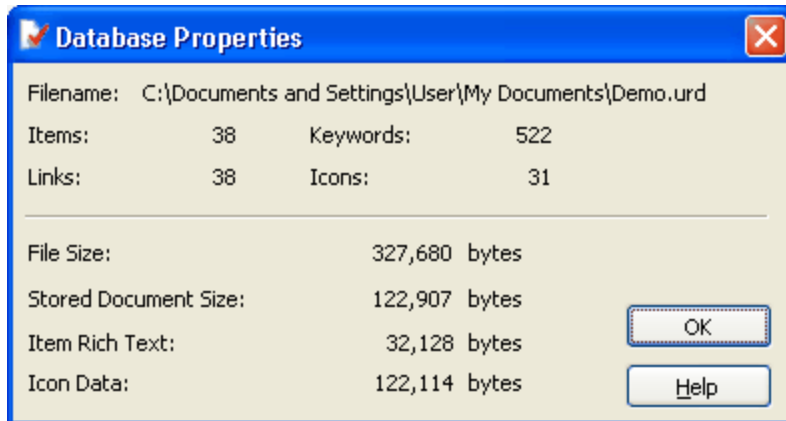
Filename: The full path and filename of the current Info Database.
Items: The total number of Info Items.
Links: The total number of times an Info Item is linked (this number will exceed the previous count if any Info Items are linked to more than 1 parent Info Item).
Keywords: The total number of keywords assigned to all Info Items.
Icons: The total number of different icons available to assign to Info Items.

File Size: The size of the current Info Database.
Stored Document Size: The combined size of all stored documents.
Item Rich Text: The combined size of all rich text stored.
Icon Data: The combined size of all icons assigned.

How to access:
- Menu Bar: *File | Properties...*

4.5.10 Enter Password

When Ultra Recall attempts to open an Info Database and it is encrypted, you will be prompted to enter the appropriate password.
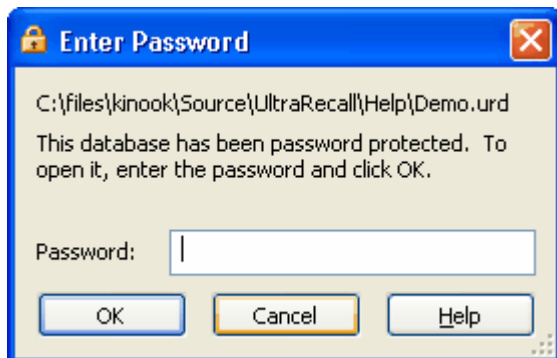
See also:
- Encryption
- Change Password Dialog

Note: Available in Professional edition only.

4.5.11 Favorites

Favorites are a handy feature in Ultra Recall providing quick access to your most-used Info Items.
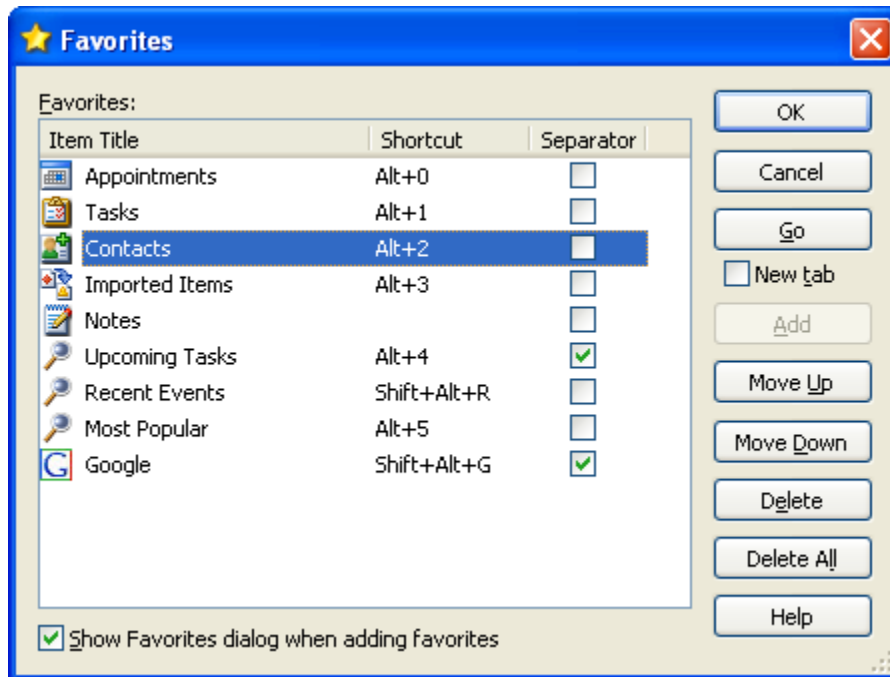
From this dialog you can add the Info Item currently selected in this Info Database, assign a shortcut to your **favorites**, rearrange or add separators between **favorites**, and delete one or all **favorites** currently assigned.

- Click on the Shortcut cell for a favorite (or press F2 or F4) to change the shortcut for the selected favorite.
- Click the Separator checkbox (or press Space bar) to add or remove a separator before the selected favorite.
- Click the Toolbar checkbox to add or remove the selected favorite from the Favorites toolbar.

The buttons on the right side of the dialog provide access to all Favorites related features:
- **OK:** Accept all changes made to favorites.
- **Cancel:** Discard all changes made to favorites.
- **Go:** Navigate to the selected favorite Info Item (in a new tab if the New tab checkbox is checked).
- **Add:** Add the selected Info Item as a new **favorite**.
Note: this button is only enabled if the current Info Item is not already a favorite).

- **Move Up:** Move the selected **favorite** up in the list.
- **Move Down:** Move the selected **favorite** down in the list.
- **Delete:** Clicking this button or pressing Delete will delete the selected **favorite** from the list.
- **Delete All:** Delete all **favorites** currently defined.
Notes:
- **Delete** and **Delete All** will only delete the Info Item as a **favorite** and will not delete the actual Info Item*.*
- The state of the New tab checkbox also affects whether a favorite will open in a new tab when

selected from the Favorites menu, toolbar, or keyboard.

4.5.12 Forms

Custom forms are managed with the **Forms Dialog**.

Each Form has a unique name and a layout of attributes that can be modified.
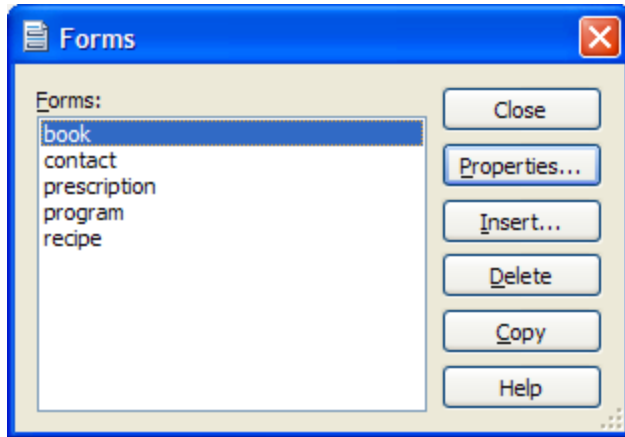
The following buttons are provided to manage the list of Forms:
- **Properties:** Click this button (or press the *Enter* key) to view or edit the selected Form
- **Insert:** Click this button (or use the *Insert* key) to create a new form
- **Delete:** Click this button (or use the *Delete* key) to delete an existing form
- **Copy:** Used to duplicate an existing form

Notes:
- Creation and modification of forms is available in Professional edition only.

How to access:
- Menu Bar: *Tools | Forms...*

See Also:
- Form Properties
- Form Viewer
- Form
- Item Attributes Pane

4.5.13 Form Properties

The **Form Properties Dialog** is used to edit the layout and properties of a form.

Name: The name of the form (must be unique).

Fields: Defines the layout of fields (attributes) to display on the form.

Note: Before adding attributes to a form, the attributes must first be created.

Each row in the grid defines a row to be displayed on the form. Click Insert (or press the Insert key) to insert or new row; click Delete (or press the Delete key) to remove a row; click Move Up/Down to move an existing row up or down.

Each row can display 0 to 3 attributes, each in a separate column. Click on a cell or press F4 to display a drop-down list to select an attribute for that row and column on the form. The list also includes a blank item to choose no attribute and a (Spacer) to insert a blank area into the form. The last column of the grid defines how many lines on the form the field will consume (using a value greater than 1 causes string attributes to span multiple lines).

After a Form has been defined, it can be assigned to the Form attribute of one or more Template items to display that form in the viewer when items of that type are selected.

How to access:
· Click the *Insert* or *Properties* button from the Forms Dialog

Note: Creation and modification available in the Professional edition only.

4.5.14 Find/Replace

The **Find in Item** and **Replace** dialogs are accessed from the Edit menu or via several shortcut keys.

The **Find In Item** dialog can be used to search for text within Rich Text Info Item components. The Replace dialog can be used to find and replace text within Rich Text Info Item components.

Here is the **Find in Item** dialog:
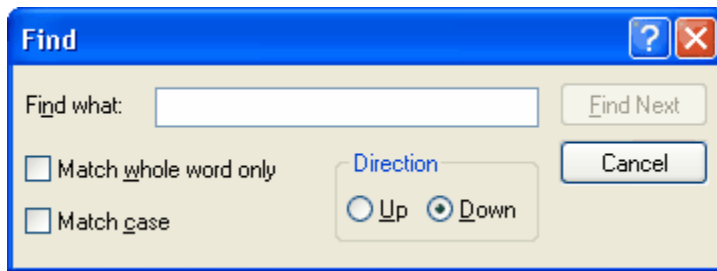
How to access:
* Menu: *Edit | Find in item*
* Keyboard: *Ctrl+F*
* Menu: *Edit | Find Next*
* Keyboard: *F3*

Here is the **Replace** dialog:
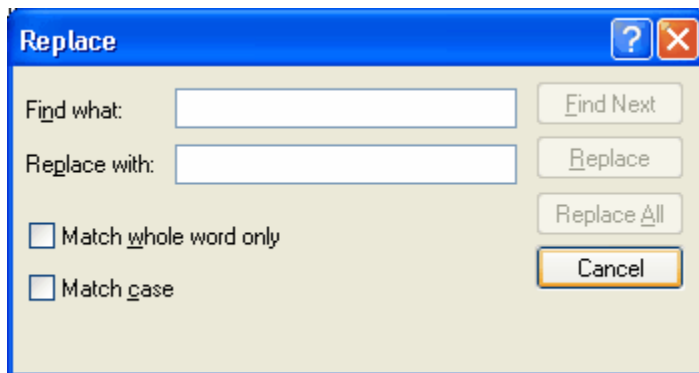
How to access:
* Menu Bar: *Edit | Replace*
* Keyboard: *Ctrl+H*

4.5.15 Insert Hyperlink

The Insert Hyperlink dialog is used to insert and edit hyperlinks to web pages and other documents within the Rich Text Editor. Links to local files can be created by dragging and dropping them onto the File/URL field or directly into the text editor. The File/URL field also auto-completes filenames or web pages as they are entered. A hyperlink in the text editor can be opened by clicking on it or choosing the Item | Open Shortcut menu item (Ctrl+Q or Ctrl+Shift+Q default keyboard shortcut).
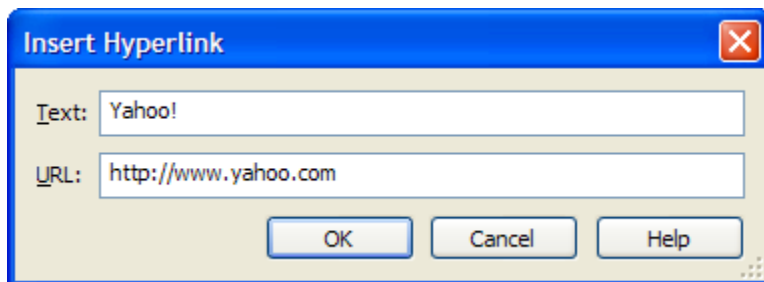
How to access:
* Menu Bar: *Format | Insert Hyperlink...*
* Keyboard*: Ctrl+Shift+K*

See also:
- Internal Linking
- Logical Linking
- Text Editor

4.5.16 Insert Table

The **Insert Table** dialog is used to insert a table into the Rich Text Editor.

Table cell values can be edited and additional rows can be added by tabbing through the table cells. Existing rows can be deleted by selecting the row (click to the left of the table row) and pressing Delete. Tables can also be created and modified by editing a rich text item externally in Office, WordPad, or another rich text editor.

Notes:
- Width and padding are specified in twips (1440 twips = 1 inch).
- This feature requires `RICHED20.DLL` *version 5.50* or later (as shown in *Help | About | Install Info*) to be installed in the Ultra Recall installation folder. This can be done during installation by checking the *Install rich edit control with table support* option. If Office 2007 or later is installed and the *Use Office rich edit control* option is checked during installation, additional table editing features will be available (resizing of columns and rows, etc.).

How to access:
- Menu Bar: *Format | Insert Table*
- Format Toolbar

4.5.17 Item Keywords

The **Item Keywords Dialog** is used to view, tag, and search on user-defined keywords and to view or delete auto-generated keywords.
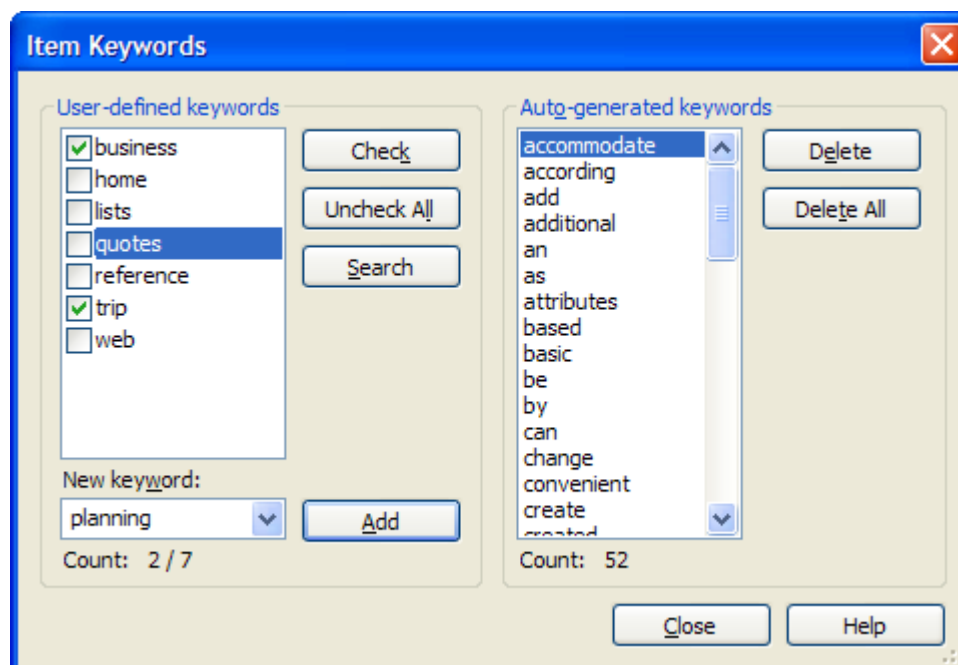
User-Defined Keywords

The User-defined keywords section is used to view or assign keywords (also called **tags, categories,** or **labels**) for all selected items.

The list displays all user-defined keywords used in the current database, with a check mark next to keywords that are assigned to the current selection.
- To assign an existing keyword, either check its checkbox and click Check/Uncheck.
- To assign a new keyword, type the keyword (a word or phrase) and click Add or press Enter.
- To unassign a keyword, uncheck it.
- To unassign all keywords for all selected items, click Uncheck All.

To quickly find all items having a given keyword, double-click on the word or select the word and click Search. You can also search on multiple keywords via a search item.

Auto-Generated Keywords

As information is added to Ultra Recall, new Info Items are created, and all relevant words in the data are identified and assigned as auto-generated Item Keywords to each Info Item. Searches can be performed to find all items with one or more keywords.

You can view or delete auto-generated keywords using the buttons next to the auto-generated keyword list.

Note: This list will always be empty if full-text search enhancements are enabled (the full text is stored instead of individual keywords).

How to access:
- Menu Bar: *Item | Keywords...*
- Keyboard*: Ctrl+K*

See Also:
- Auto-generated keywords
- User-defined keywords
- Search
- Keyword Exclusions Dialog

4.5.18 Jump

The **Jump Dialog** provides another method for quick navigation to an item.
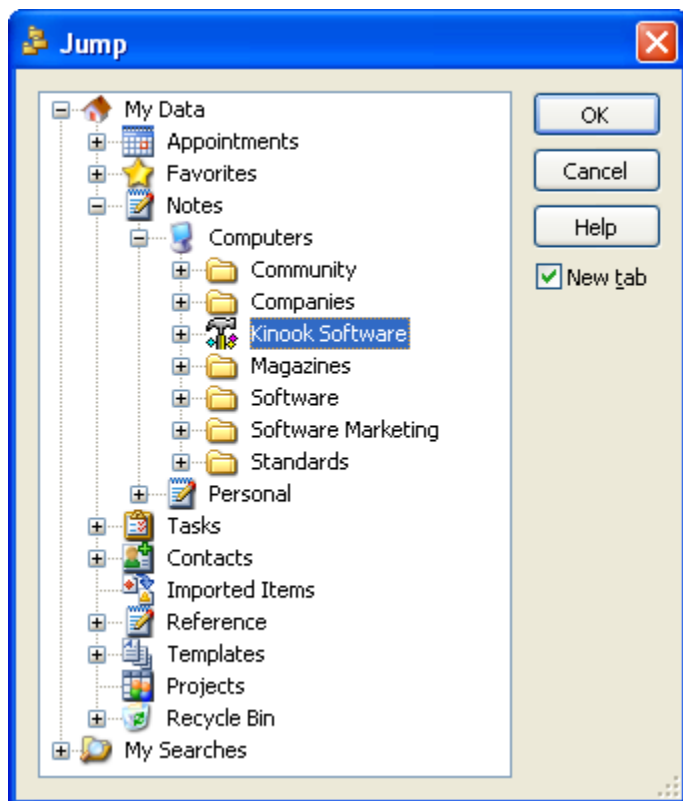
Navigate to the desired item, and press Enter or click OK to navigate to that item in the Data Explorer pane. If the *New tab* checkbox is checked, the item will be opened in a new tab. The dialog remembers the item that was last selected when it is opened again.

How to access:
- Menu Bar: *Tree | Jump...*

4.5.19 Link/Move/Copy

This dialog is used for:
- Another method for linking, moving, or copying items to or from another location.
- Quickly navigating to another item.
- Choosing a location to import when capturing information from other applications if the *Select location when importing or pasting from other applications* option is checked.
- Selecting an item for the info item attribute type .
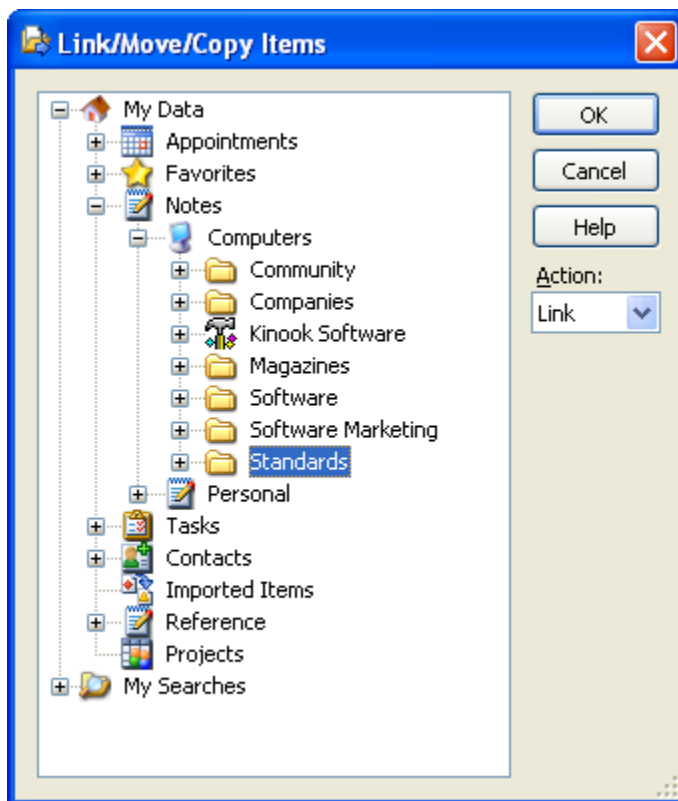
In the Data Explorer pane, select the item(s) to link, move or copy to or from. Open this dialog from the Tree menu, select the desired item, and press *Enter* or click *OK* to link, move, or copy the selected items to or from the new location. The dialog remembers the item that was last selected and the last action when it is opened again.

Note: When the Item Details pane of a text item is active, and if the *Create internal link from Link/Move dialog with focus in Details pane* option is checked, the Link dialog can be used to insert an internal link into the current item.

How to Access:
* Menu Bar: *Tree | Link/Move To...* and *Tree | Link/Move From...*
* Menu Bar: *Tree | Jump...*
* Capturing from another application
* Editing an info item attribute value in the Item Attributes pane, a Form, or an Advanced Search.

See Also:
* Logical Linking
* Internal Linking
* External Linking
* Navigation
* Import Options
* Capturing Information

4.5.20 Keyword Exclusions

As new Info Items are created, auto-generated Item Keywords are identified and assigned to each new Info Item (and maintained as each Info Item is later updated). Any **exclusion keywords** found in this dialog will be not added as auto-generated Item Keywords (but can still be manually assigned).
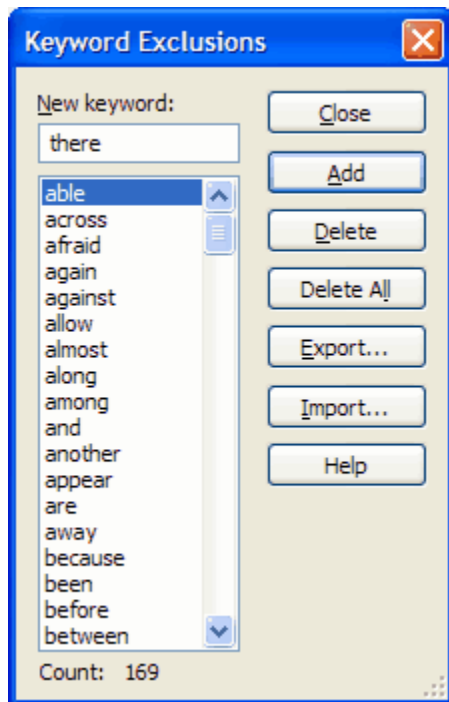
Keyword exclusions can also be exported to a text file or imported from a text file using the Import and Export buttons. The exclusions will be exported to a text file with each keyword on a separate line. When importing, the imported keywords will be added to any existing keywords (delete all existing keywords first to replace the current list).

Note: This dialog is available only if full-text search enhancements are disabled.

How to access:
· Menu Bar: *Tools | Keyword Exclusions...*

4.5.21 Numbering Format

The **Number Format** dialog is used to change the numbering format and style for the current selection in the Rich Text Editor.

Specify the numbering format, style, and indent and click OK to change the numbering format.

Note: The indent value is specified in twips (1440 twips = 1 inch).

How to access:
· Menu Bar: *Format | Numbering*
· Format Toolbar

4.5.22 Options

This dialog is used to configure user-specific settings for the Ultra Recall application, and is accessed from *Tools | User Options* on the menu bar. Quick access to many of the options is also available from the *Tools | Quick Options* menu.

The **Options dialog** is categorized with tabs. The different tab categories include:
· General
· Search

- Trees
- Trees (More)
- Grids
- Fonts
- Editor
- Browser
- Documents
- Import
- Import (more)
- Attributes
- Reminder
- Miscellaneous
- Extension Lists

Note: These options are stored in the registry under the key
`HKEY_CURRENT_USER\Software\Kinook Software\Ultra Recall\Options`. To restore all
the default option settings, exit Ultra Recall and delete or rename this registry key using RegEdit.

How to access:
- Menu Bar: *Tools | Options...*

4.5.22.1 General Options

The **General** tab of the Options dialog contains several settings that affect features common to the
entire Ultra Recall application:

Startup
Run Ultra Recall when Windows starts: If checked, Ultra Recall will be started when Windows
starts (it will open the last Info Database previously closed).

Minimize application window at startup: If checked, Ultra Recall will always start up minimized.
Either a task bar entry or a system tray icon will be displayed (depending on whether the *Minimize to
system tray* box is checked or not).

Behaviour
Windows taskbar entries: Determines whether one Windows taskbar icon is displayed for all open
databases or one for each open database (the default depends on whether the Database toolbar is
displayed).

Show application icon in system tray: If checked, an application icon will be displayed in the
system tray for each open Info Database.

Minimize to system tray: If checked, no task bar entry will be displayed when the application is
minimized, but rather just a tray icon.
Note: this check box is only enabled when the <u>Show application icon in system tray</u> *checkbox is
checked.*

Close button minimized application window: If checked, the application will minimize instead of
close when the *Close* button (upper right corner) is clicked.

Esc minimizes application window: If checked, pressing the *Esc* key while any part of the Ultra
Recall application is focused will minimize that instance of Ultra Recall.

Reload selection and tabs from last database session: If checked, all previously loaded tabs,
hoisting, and selected items will be reloaded when a database is reopened (uncheck to disable this
globally, or hold down Shift while opening a database to bypass just for that database).

Keyboard

Activation hot key: Choose a combination of simultaneously depressed keys to activate Ultra Recall (defaults to Shift+Win+Z). Whenever the keys defined are depressed simultaneously from any active application, Ultra Recall will be activated.

4.5.22.2 Search Options

The **Search** tab of the Options dialog contains several settings that affect search features.

General

Automatically start saved search when search item selected: If checked, Ultra Recall will automatically start Search Info Items when they are selected (single select only).

Select first match after search completes: If checked, the first matching search item or text will be selected after the search finishes.

Note: If both this *and* the previous option are checked, it is not possible to edit the search criteria unless the search is canceled before it finishes.

Highlight matches: If checked, search terms in the item text (for rich text and web page items and other parsed documents with no viewer configured to display in the text editor) and item notes of search result items will be highlighted.

Note: Highlighted rich text items are not editable (otherwise, the highlighting would become a permanent part of the text formatting). To edit a highlighted text item, choose *Item | Edit Text* on the menu.

Continue highlighting after selection change in tree: If checked, continues highlighting search terms in item text even after a different item is selected in the Data Explorer or Search panes.

Quick Search

Incremental search delay when typing: When entering search criteria while in Quick Search mode, Ultra Recall will automatically execute the search after you revise the criteria after this delay setting. If this delay value is set to 0 milliseconds, no automatic search execution will occur (you can manually invoke execution with the *Start* button).
Default Value: 700 milliseconds

Maximum items in Quick Search combo: The entry field for Quick Searches remembers the last search searches you use, up to the maximum number specified here. As you enter new searches over the maximum limit, the oldest searches entered is discarded, keeping only the last specified number.
Default Value: 50
Note: Clicking the Remove All button will erase the list currently remembered criteria entries and start over.

Enable auto-completion in edit control (requires restart): If this box is checked, Ultra Recall will auto-complete what you are typing (from the values that are remembered in the combo as set with *Maximum items in Quick Search combo*).
Note: If this value is changed, a restart is required for it to take effect.

See Also:
· Search
· Quick Search

4.5.22.3 Tree Options

The **Trees** tab of the Options dialog configures settings that are related to the different tree displays used in Ultra Recall. These include:
- Data Explorer Pane
- Search Pane

Appearance

Show tree lines: If checked, tree lines will be displayed, otherwise they won't be.
Default Value: checked

Show item flag icon in tree (requires restart): If checked, the status icon (if assigned) will be displayed next to the regular Icon.
Note: If this value is changed, a restart is required for it to take effect.

Show leaf items in tree: If unchecked, items with no children will not be displayed in the Data Explorer or Search Pane and will only be displayed in the Related Items pane (Child Items or Search Results). If checked, all items with children will be displayed in the tree.
Note: Even when unchecked, all immediate children of the root item (My Data or My Searches), as well as Search items, will be displayed (even if they have no children).

Behavior

Collapse all when opening database: If checked, all items in the Data Explorer and Search panes will be collapsed when opening an Info Database.

Scroll horizontally on selection change to keep text visible: As more information is added to an Info Database, the width of the titles in these Panes can require significant scrolling to keep them in view during navigation. If this box is checked, Ultra Recall will scroll the selection horizontally automatically as the selection changes to maximize display of Info Item titles.

Expand children when going to item: If checked, an Info Item is expanded when it you go to it from a different Pane (ie. Related Items Pane).

Scroll item to top of tree when going to item: If checked, Ultra Recall will automatically scroll to place the first selected Info Item to the top of the tree to maximize the display of pertinent Info Items when going to an Info Item.

Single-click to expand an item: If checked, Info Items will expand with a single click. Dbl-clicking Info Items will always expand/collapse or clicking on the +/- symbol, regardless of whether this box is checked.

Collapse siblings when expanding an item: If checked, all siblings of the item being expanded by double-clicking (or single-clicking if the above option is checked) or clicking *Enter* will automatically collapse. This sibling auto collapse will also occur for other navigation, such as selecting a favorite, opening a reminder, etc. Even when this option is enabled, using the + button (or the right arrow key) to expand an Info Item will not trigger this behaviour. *This feature can be helpful in minimizing tree clutter.*

Alphabetically sort when adding children to new items: If checked, new child items inserted under an item without children will be sorted alphabetically. If unchecked, new child items inserted under an item without children will be ordered manually (order of creation). Existing siblings can be sorted to sort alphabetically (or reverse alphabetically) or moved up or down to order manually.

Insert at top/above when inserting child/sibling in manually ordered list: If checked, a new child or sibling item inserted in an item with children that are manually ordered (moved up or down) will be inserted at the top of the list instead of the bottom, or above the selected item.

Select parent item after delete: If checked, the parent item of the first deleted item will be selected afterwards. If unchecked, the remaining item at the position of the first deleted item will be selected after deleting.

4.5.22.4 Tree (More) Options

The **Tree (More)** of the Options dialog tab configures settings additional tree behavior settings.

Hoisting / Title Locking / Favorites Behavior
Hoist tree when going to an item: If checked, when going to an Info Item (for instance, when going forward or backward in the navigation history, clicking an internal link, double-clicking a search result, select a favorite, etc.), the item will be hoisted in the tree.

Hoist tree when going to a favorite: If checked, when opening a favorite, the favorite item will be hoisted in the tree.

Hoist tree when locking tab title or going to a locked item: If checked, when locking a tab title or going to a locked item, the item will be hoisted in the tree.

Lock tab when going to a favorite: If checked, when opening a favorite, the favorite item title will be locked in the tab.

Launch favorite externally with Ctrl down: If checked, when opening a favorite (by clicking the Favorites toolbar or menu item or typing its shortcut key) with the Ctrl key held down, the URL of the favorite item will be launched externally instead of navigating to the favorite within Ultra Recall. This can be useful for using favorites to launch external applications and files. If this option is unchecked, holding the Ctrl key down when opening a favorite will open the item in a new tab.

Focus / Selection Behavior
Set focus to active selection pane when going to an item: If checked, focus will shift to the active Selection Pane when going to an Info Item. Otherwise the focus will remain in the original Pane.

Set focus to Item Details pane when going to an item: If checked, focus will shift to the Item Details Pane when going to an Info Item.

Set focus to form when inserting an item: If checked, focus will shift to the first form field when insert an Info Item based on a template with a form. If unchecked, focus will remain in the tree and the title will be edited.

Delay before updating item access date: If the provided value (in milliseconds) is not 0, Ultra Recall will automatically update the *Access Date* Item Attribute after this amount of time when you select an Info Item.
Default Value: 4000 milliseconds (4 seconds)

Drag/Drop Behavior
Auto-expand only when dragging over item +/- button: If checked, an Info Item will only auto-expand when dragging over the +/- button for each Info Item. If not checked, it will auto-expand when dragging over any part of the Info Item.

Delay before auto-expanding when dragging over items: If checked, Ultra Recall will only auto-expand Info Items after a delay while dragging over them.

4.5.22.5 Grid Options

The **Grids** tab of the Options dialog configures settings that are related to the different grid displays used in Ultra Recall. These include:
- Data Explorer Pane

- Search Pane
- Related Items Pane
- Item Attributes Pane

Explorer Tree / Search Tree / Child Items
Use flag colors for item text color (requires restart): If checked, the *Item Title* for each Info Item will use a text color matching the status color.
Note: Changes to this box will not take effect until Ultra Recall is restarted.

Wrap long cell text (requires restart): If checked, all grid/tree panes will wrap long cell text (longer than can be displayed) to multiple rows (up to 9 rows of text per cell). If not checked, a horizontal scroll bar is available, and a tool tip will display the entire text (if too long to be fully displayed) when hovered over.

Child Items / Selected Items / Search Results:
Full row select: If checked, the full row will always be selected, otherwise only the first column indicates selection.

Display grid lines: If checked, grid lines will be displayed. Otherwise no grid lines are visible.

Show expandable indicator for items with children: If checked, items with children will have a +/- button or triangle displayed on the left, and clicking on this button will select the item in the tree.

Item Attributes
Show column header: If checked, a Column header will be displayed as the top row in the Item Attributes Pane.

Categorize attributes (sort alphabetically if unchecked): If checked the Attributes displayed in the Item Attributes Pane will be categorized (then sorted alphabetically), otherwise they will just be sorted alphabetically).

Automatically sync documents when URL attribute is changed: If checked, Info Items based on the Document Template Group will automatically synchronize when the *URL* Attribute value is changed (to a valid *URL*).

Item Parents
Expand all parents when loading: If checked, all levels of parents (parent, grandparent, great-grandparent, etc.) will be expanded when loading the Item Parents Pane.

4.5.22.6 Font Options

The **Font** tab of the Options dialog configures font settings.

Data Explorer and Search panes: The font used by the Data Explorer and Search panes. Check the checkbox to use the Windows default font, or uncheck and click Change Font to choose the font to use.

Selected Item: Determines the font used to display the selected item. Check the checkbox to use the Windows default font, or uncheck and click Change Font to choose the font to use.

Note: If a larger font is used for the *Selected item* option than the *Data Explorer and Search panes* option, the Wrap long cell text option should also be checked to ensure that the row height is large enough to display the font.

Related Items pane: The font used in the Related Items pane. Check the checkbox to use the Windows default font, or uncheck and click Change Font to choose the font to use.

Item Attributes and Item Parents panes: The font used in the Item Attributes and Item Parents panes. Check the checkbox to use the Windows default font, or uncheck and click Change Font to choose the font to use.

Note: Editor fonts are configured on the Editor Options tab.

4.5.22.7 Editor Options

The **Editor** tab of the Options dialog configures settings that are related to the Text/Rich Text editors available in the Item Details Pane.

Auto-save changes every __ minutes (0 to disable): This setting determines how often Rich Text is auto-saved (each save is undoable).

Default rich text editor font: Click the button to change the default font used by the Rich Text Editor.

Show item text for documents with no viewer: When checked, if a stored document that no viewer is configured for is selected (and its extension is not configured to be viewed externally) and Ultra Recall is able to parse the document for text, the parsed text will be displayed (read-only) in the Item Details pane.

Note: Available in Professional edition only.

Show combined text for multiple selection: When checked, if multiple items are selected in the Data Explorer or Search panes, the combined text for all selected items will be displayed (read-only) in the Rich Text Editor. *Note:* Available in Professional edition only.

Create hyperlinks to files dropped on text editor: If checked, dragging file(s) from Explorer into the Rich Text Editor will create a hyperlink to that item. If unchecked, the file contents will be stored as an object in the rich text.

Create internal link from Link/Move dialog with focus in Details pane: If checked, when focus is in the Item Details pane of a text item, the Link/Move/Copy dialog can be used to insert an internal link into the current item.

Handle Tab key in text editor when focused: If checked, pressing the Tab key in the Rich Text Editor inserts a tab character into the editor. If unchecked, the Tab key moves focus to the next or previous pane.

File extensions to display in text editor: The content of files with these file extensions will edited in the Text Document Editor (other text documents will not be edited internally).

Text document editor font: Click the button to change the font used by the Text Document Editor.

Auto-detect URLs when editing text files: When checked, *URLs* in the Text and Rich Text Editors function like hyperlinks.

Use syntax coloring editor for text files: If checked, a syntax coloring text editor will be used to edit imported plain text files. This can be useful for editing source code files and snippets for languages such as C++, C, C#, ASP, VBScript, JavaScript, XML, and Lua. In addition to syntax coloring, the text editor also provides code folding, auto-completion (Ctrl+Space), bookmarks, line numbers, and more.

4.5.22.8 Browser Options

The **Browser** tab of the Options dialog configures settings concerning how and what web and related content are displayed with Ultra Recall.

Web Browser / Explorer View

Launch shortcuts in external browser window by default: When checked, Ultra Recall will always open web shortcuts that are clicked in an external browser (the default browser on your system).

Note: This includes URLs entered in the Web Toolbar.

Reuse existing browser window when opening links externally: When checked, Ultra Recall will reuse an existing browser window when launching URLs externally. Otherwise, Ultra Recall will always create a new browser instance.

Block browser popup windows in internal browser: When checked, the internal browser will block popup windows from being displayed or navigated to in Ultra Recall. Otherwise popup windows will not be blocked in the internal browser.

Block dialogs in internal browser: When checked, dialogs initiated by the internal browser will not be displayed. If unchecked, browser dialogs will be displayed.

Process link clicks internally: If checked, links that are clicked on in the internal browser will be processed by Ultra Recall. This enables features like Ctrl+click to open a link in a new tab, etc. Unchecking this option disables that functionality, but it may be needed for links on some dynamic web pages to work properly.

Prevent browser window from stealing focus: If set to Always or Documents only and the related focus options are unchecked, focus will be restored to the active pane after a page (if set to Always) or document (if set to Always or Documents only) loads in the browser pane and takes the focus (some web pages and also documents editors for Office and PDF documents may steal focus when loaded in the internal browser view).

File extensions to display in internal browser view: Files with extensions in this list will be displayed in the Internal Browser View*.*

Note: If an Info Item has a URL that is a folder, adding ***folder** to this list will cause Ultra Recall to display the folder's contents when that item is selected (if the Info Item doesn't already contain some rich text in the Item Details Pane).

Explorer view mode: This setting affects how the Internal Browser View will display in used in Windows Explorer mode. Examples are *.zip* and **folder* when these are included in the *File extensions to display in internal browser view*.

Web Address Toolbar Combo
Combo box width: This setting allows you to customize the width of the Web Toolbar.

Maximum items in drop-down list: The Web Toolbar remembers the previously entered URLs, up to the maximum number specified here. As you enter new URLs over the maximum limit, the oldest URLs entered are discarded, keeping only the last specified number.

See Also:
- Internal Browser View
- Windows Explorer Mode

4.5.22.9 Documents Options

The **Documents** tab of the Options dialog configures settings related to viewing and editing documents in Ultra Recall.

Document Editing
File extensions to edit/view externally: Extensions listed here will be excluded from being viewed internally but will launch externally instead. This overrides specific extensions that may be mapped to

a particular document type (for instance, .ini files will be displayed in the Text Document Editor if the .txt extension is specified for the file extensions to be displayed in the text editor since .ini files are text files, but adding .ini here will override that and prevent .ini files from being displayed in the text editor).

File extensions to open stored documents writeable: Stored Files with an extension in this list will be opened writeable instead of read-only.

Prompt before updating from local copy of stored document: If a stored file was opened writeable, based on the above option, and this box is checked, the user will be prompted before Ultra Recall updates the stored copy of the changed file. Otherwise Ultra Recall will automatically update the stored copy when it is edited externally and saved.

Allow internal editing of linked documents: If checked, linked text and rich text documents can be edited internally in Ultra Recall. If unchecked, linked documents will be read-only when viewed within Ultra Recall.

Automatically begin editing web page items when selected: If checked, web page items will automatically be shown in edit mode when selected. *Note:* If this option is checked, highlighting and selecting of matching text in web page items is not possible.

File Viewers
File extensions to display in image viewer: Files with extensions in this list will be displayed in the Image Viewer.

File extensions to display in MIME viewer: Files with extensions in this list will be displayed in the MIME Viewer.

4.5.22.10 Import Options

The **Import** tab of the Options dialog configures settings related to Importing information into Ultra Recall.

Clipboard
Automatically import clipboard changes: If checked, data that is copied or cut to the clipboard (from any application) will automatically be imported.

Import clipboard contents hot key: The checked boxes and entered character define a keyboard shortcut that import the current clipboard contents into Ultra Recall (defaults to Ctrl+Win+V). This can be useful for copying and pasting into Ultra Recall from another application without leaving that application -- simply press Ctrl+C to copy the desired text, HTML, URL, Explorer file(s) or folder(s), etc., then press this hot key to import that information into Ultra Recall. The options below determine where the items will be imported and whether or not the contents of imported documents will be stored.

Choose location when importing or pasting from other applications: If checked, when importing from other applications (via the import hot key above, Internet Explorer and Outlook toolbars, Firefox and Thunderbird/Postbox extensions, Explorer send to menu, command-line, etc.), the Link/Move/Copy Dialog will be displayed to choose the location to import to.

Insert imported items at bold [or selected] item in Data Explorer pane: If checked, new imported items will be added as children to the bold/selected Info Item in the Data Explorer Pane. If not checked, new imported items will be added as children of the *Imported Items system* Info Item.

Store contents when importing or syncing files, web pages, and Outlook items: If checked, documents, web pages, or Outlook items that are imported or synchronized will default to having their contents stored.

Identify and process URLs in clipboard text: If checked, and one or more URLs are detected in the clipboard text when importing/pasting, each *URL* will be imported as a separate Info Item. If not checked, all text will simply be imported as a single Info Item for the text.

Prefer text/rich text clipboard formats: If checked, text and rich text formats on the clipboard will be used when pasting or importing even if other formats such as HTML, URL, and MIME are available.

Select last item after importing: If checked, after importing information into Ultra Recall, the last imported item will be selected in the tree.

File extensions to parse text: Files containing these extensions will be parsed for text to enable searching the text content.

Note: Parsing text from .pdf and .zip files available in Professional edition only.

4.5.22.11 Import (More) Options

The **Import (More)** tab of the Options dialog configures additional settings related to Importing information into Ultra Recall.

Web Import
Connection timeout: This value is used to determine whether the initial internet connection timed out or not. Setting this value to 0 indicates no timeout value (not recommended).
Default Value: 60 seconds

Data receive timeout: This value is used to determine whether an internet transfer has timed out or not. Setting this value to 0 indicates no timeout value (not recommended).
Default Value: 30 seconds

Download scripts: If checked, Ultra Recall will download script when storing contents of a web page. If not, script code will not be downloaded.
Note: Not checking this will enhance download performance, and eliminate potential malicious script code from being retrieved. Also, script code often doesn't function normally from a local file anyway.

Download Images: If checked, Ultra Recall will download images when storing contents of a web page. If not, images will not be downloaded.
Note: Not checking this will enhance download performance, especially or slow network connections.

Always use IE cached version of files if available: If checked, when importing documents from the web, Ultra Recall will always use the most recent version of any files found in Internet Explorer's temporary file cache. You can check this option if IE is your default browser to speed up imports. If unchecked, Ultra Recall will query the server for each file's timestamp (and retrieve the file if the server reports it has a newer copy) in order to ensure that the most recent version of the file is processed.

Download entire document for text and summary information when not storing contents: If checked, when importing documents from the web and not storing contents, the entire document will be retrieved to gather any text and summary properties from the document. Leave this unchecked to speed up importing of large remote files; check this option only if documents larger than 1 MB need to be keyworded or processed for summary information.

Use page title for item title if available: If checked and the web page has a title, its title will be used for the item title in Ultra Recall. If unchecked, the page URL will be used for the title.

File Import
Include subfolders by default when importing folders: If checked, Ultra Recall will default to including subfolders when importing folders. Otherwise subfolders will not be included.

Map Explorer summary properties to existing Ultra Recall attributes: If checked, Ultra Recall will add Attributes for any document summary property values with names that match existing Ultra Recall Attributes (case-insensitive match).

Note: Available in Professional edition only.

Use document title for item title if available: If checked and the document has a title, its title will be used for the item title in Ultra Recall. If unchecked, the filename will be used for the title.

Create logically linked items for duplicate URLs: If checked, when a file or web page is imported that already exists in Ultra Recall, a logical link to the existing Info Item will be created instead of a duplicate Info Item. If the URL is still valid, the Info Item will also be resynchronized.

Note: Available in Professional edition only.

Automatically skip unreachable URLs: If this option is unchecked, the user will be prompted whether to continue importing when a bad file or URL is encountered (holding *Shift* when *Yes* is clicked will prevent additional prompts). If this option is checked, no prompts will occur and unreachable URLs will be skipped automatically.

See Also:
- Document Summary Attributes
- Importing Data
- Synchronization
- Logical Linking

4.5.22.12 Attributes Options

The **Attributes** tab of the Options dialog configures settings that are related to *System* Attributes and the Item Attributes Pane.

System Attributes to display: The *System* Attributes checked in this list will be displayed in the Item Attributes Pane / Related Items Pane and will be available to Advanced Searches.

Tab key starts item attribute editing and edits next attribute: If this box is checked, hitting the *Tab* key when the focus is on an Attribute Name in the Item Attributes Pane will starting editing of that Attribute's value. Hitting the *Tab* key while <u>editing</u> an *Attribute* value will start editing of the next Attribute value.

Use popup date control for date attributes: If checked, clicking on a Date attribute type will edit the date in a popup control. If unchecked, Date attributes will be edited inline with an up/down button to change the month, day, and year.

4.5.22.13 Reminder Options

The **Reminders** tab of the Options dialog contains several settings that affect reminder features.

When a reminder comes due
Display a reminder tray notification: Causes Ultra Recall to display a tray icon balloon when a reminder is due. The timeout slider determines how long the balloon remains visible after being displayed (a range of 5 to 30 seconds).

Display the reminder dialog: Causes the Reminder Dialog to be displayed when a reminder becomes due.

Activate the reminder dialog: Causes the Reminder Dialog to be brought to the foreground and focused when the reminder dialog is displayed.

Activate when in full screen mode: Causes the Reminder Dialog to be brought to the foreground and focused when the reminder dialog is displayed, even if the current application is in full screen mode.

Play a reminder sound: Plays the specified sound when a reminder becomes due.

Note: Clicking the reminder tray notification balloon will cause the Reminder Dialog to be displayed if not already visible.

See Also:
- Reminders
- Reminder Dialog

4.5.22.14 Miscellaneous Options

The **Miscellaneous** tab of the Options dialog configures miscellaneous settings.

Display full path of database file: If checked, the full path of the database file is shown in the window title bar, Window menu, and Database toolbar.

Item command-line format: Determines the command-line syntax used when copying the selected item's shortcut to the clipboard via the *Item | Copy Item Command-Line* menu item or keyboard shortcut (Ctrl+Shift+I). The available variables are:
`%UR%`: Expands to the Ultra Recall executable filename.
`%URX%`: Expands to the full path+filename of the Ultra Recall executable (including quotes if necessary).
`%DB%`: Expands to the full path+filename of the current Ultra Recall Info Database (including quotes if necessary).
`%DB_URL%`: Expands to the URL form of the current database path+filename.
`%ITEM%`: Expands to the item ID Attribute of the selected Ultra Recall Info Item.
`%ITEM_PATH%`: Expands to the full lineage of item ID Attributes (item ID of item, its parent, grandparent, etc.) for the selected Ultra Recall Info Item.
`%ANCHOR%`: Expands to the cursor position for the selected Ultra Recall Info Item (Text and derived items only).

Ultra Recall supports a command-line or URL syntax:
- To use the URL syntax, enter a command-line format of
  `ur://%DB_URL%?item=%ITEM_PATH%&pos=%ANCHOR%`
- To use the command-line syntax, enter a command-line format of `%UR% %DB% /item %ITEM%`

Insert date/time as: Determines the format used for the date and/or time when inserting via the *Edit | Insert Date+Time* and *Item | Rename To | Date+Time* menu items or keyboard shortcuts and when formatting a custom item title based on a date attribute.

Note: If Custom is selected (available in Professional edition only), a custom format must be entered or selected in the following field, and the following formatting codes are available (all other text will be treated as literal text):

%a	Abbreviated weekday name
%A	Full weekday name
%B	Full month name
%c	Date and time representation appropriate for locale
%d	Day of month as decimal number (01-31)

%H	Hour in 24-hour format (00-23)
%I	Hour in 12-hour format (01-12)
%j	Day of year as decimal number (001-366)
%m	Month as decimal number (01-12)
%M	Minute as decimal number (00-59)
%p	Current locale's AM/PM indicator for 12-hour clock
%S	Second as decimal number (00-59)
%U	Week of year as decimal number, with Sunday as first day of week (00-53)
%w	Weekday as decimal number (0-6; Sunday is 0)
%W	Week of year as decimal number, with Monday as first day of week (00-53)
%x	Date representation for current locale
%X	Time representation for current locale
%y	Year without century, as decimal number (00-99)
%Y	Year with century, as decimal number
%z, %Z	Either the time zone name or time zone abbreviation, depending on registry settings; no characters if time zone is unknown
%%	Percent sign
%#c	Long date and time representation, appropriate for current locale. For example: "Tuesday, March 14, 1995, 12:41:29"
%#x	Long date representation, appropriate to current locale. For example: "Tuesday, March 14, 1995"
%#d, %#H, %#I, %#j, %#m, %#M, %#S, %#U, %#w, %#W, %#y, %#Y	Remove leading zeros (if any)

Check for updates every x months: Specifies how often to check for application updates (enter 0 to disable update checking). If enabled, Ultra Recall will check for updates at startup every # months specified (launching the update check in the default browser).

4.5.22.15 File Extension Lists

Several Options Dialog tabs contain lists of file extensions. These **file extension lists** use a specific format and follow a few additional guidelines that are important to understand.

Format: Each **File Extension List** is semicolon-delimited (with no spaces needed between extensions and extensions include the leading . character). For example, *.txt;.rtf;.ini;.reg;.bat;.cmd;.csv*

Several extensions reference more than just their actual extension, but rather a type of file:
- **.txt:** matches any file that contains plain text
- **.rtf:** matches any file that contains rich text (rtf)
- **.htm:** matches any file that uses the html format
- **.xml:** matches any file that contains valid xml
- **.ppt:** matches any extension that is a valid Powerpoint document
- **.eml:** matches any file that uses the MIME format (such as Outlook Express emails)
- **.msg:** matches Outlook email messages
- ***folder:** adding this extension to the *File extensions to display in the internal browser view:* list on the Browser Options tab will cause folder Info Items with a valid folder URL to display the actual contents of the folder in the internal browser view

4.5.23 Print

The **Print Dialog** is used to print all of the selected Info Items:
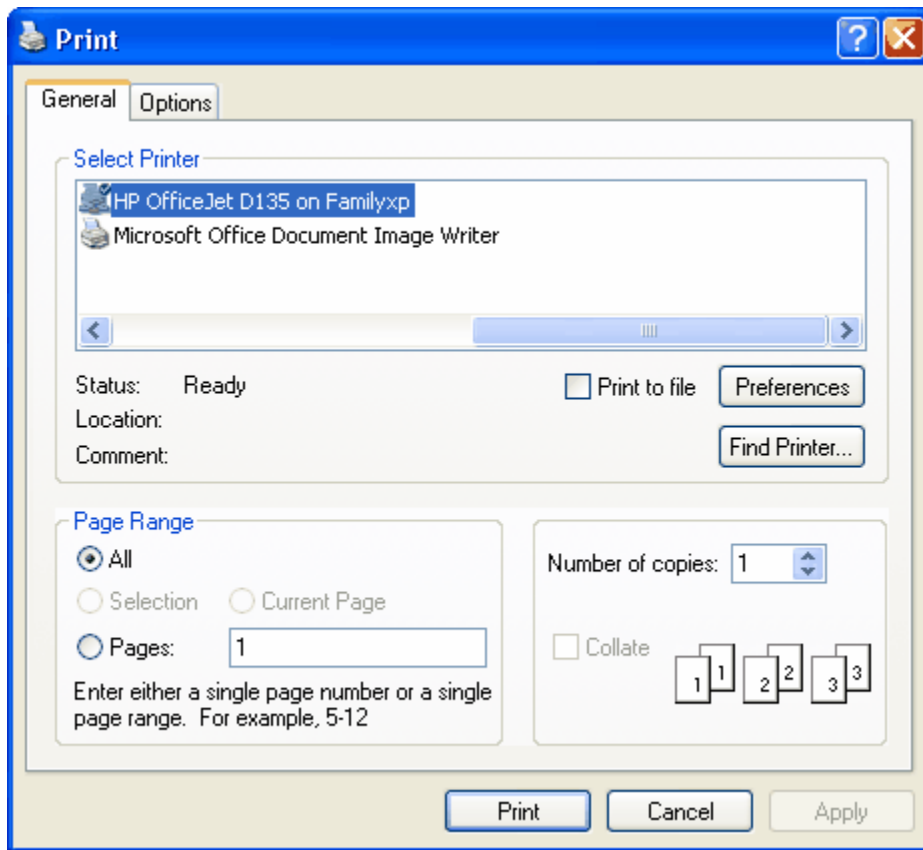
Note: You can preview (and change the default print settings) via the Print Preview Dialog.

How to access:
- Menu Bar: *File | Print*
- Standard Toolbar button
- Print Preview Dialog

4.5.24 Print Preview

The **Print Preview Dialog** is used to preview printing of the selected items. It provides several viewing options, including zoom in/out, viewing one or multiple pages. It also provides the capability to change margins and the header/footer values and positions.

All Info Items that use the Internal Browser Viewer will use the *Internet Explorer* **Print Preview Dialog**. All remaining Info Items will use the Ultra Recall **Print Preview Dialog**:

The following controls on the Print Preview Dialog provide access to the various Print Preview functionality:

100% ▾ - this control allows you to specify a specific viewing zoom ratio

- this button will zoom in (increase the viewing zoom ratio)

- this button will zoom out (decrease the viewing zoom ratio)

- this button will set the viewing zoom ratio to display one full page

⊞▾ - this button provides direct access to different multiple page preview modes

🖺 - this button provides access to the Page Setup Dialog

🖨 - this button provides access to the Print Setup Dialog

🖨 - this button displays the Print Dialog

How to access:
- Menu Bar: *File | Print Preview*
- Standard Toolbar button

See Also:
- Print Dialog
- Print Preview Page Setup
- Internal Browser View

4.5.24.1 Print Preview Page Setup

Clicking the Print Preview Page Setup Button displays the following dialog:

The **Margins** tab provides access to the page margins when printing an Info Item:
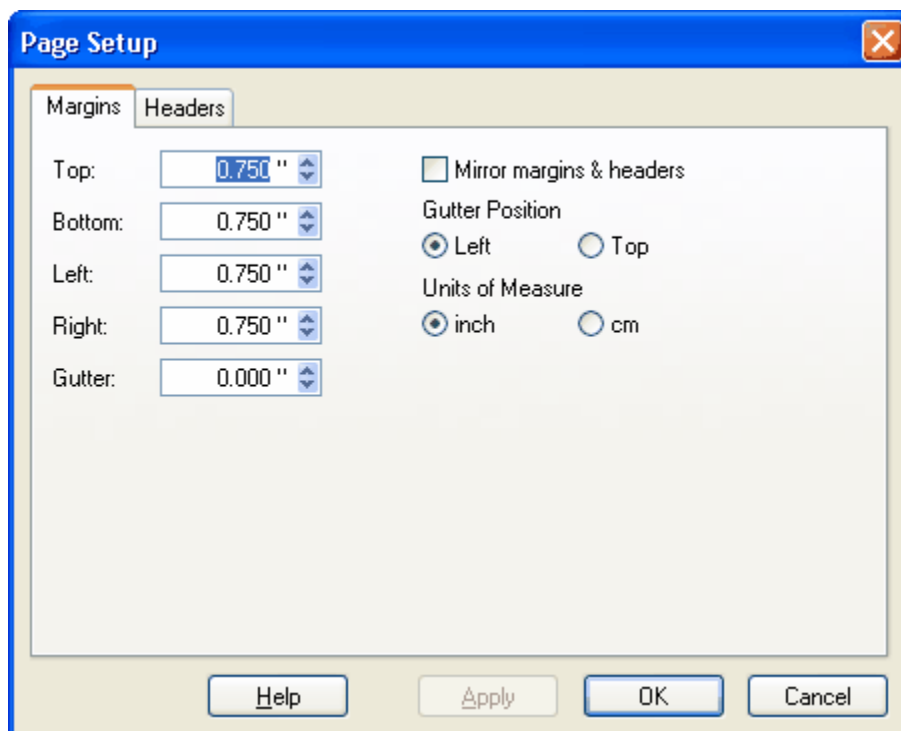
The **Headers** tab provides access to the header and footer (optionally) displayed when printing an Info Item:
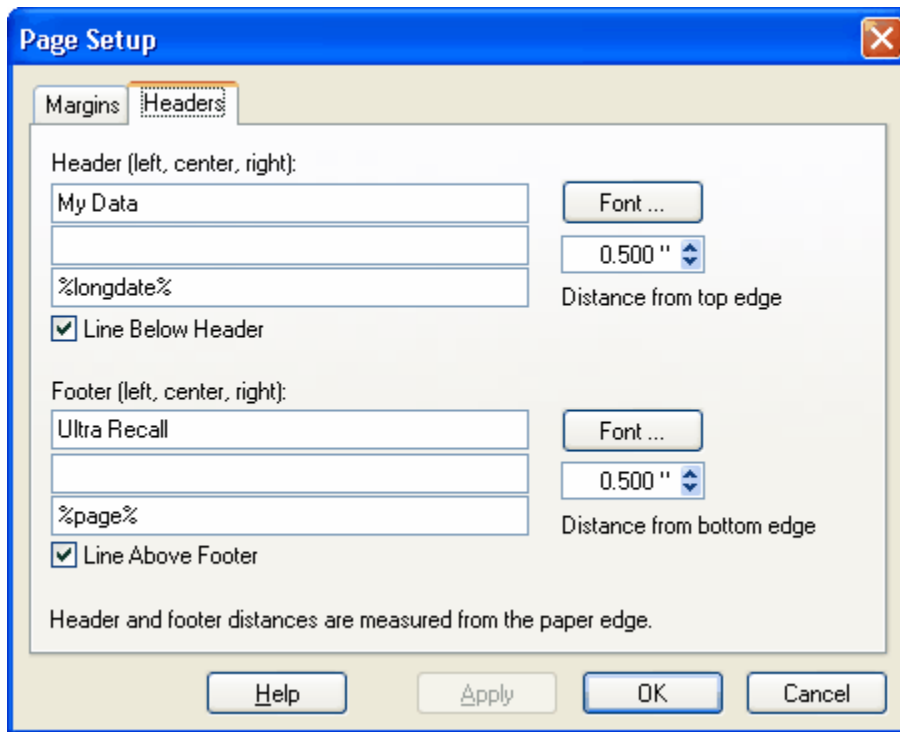
The values in % % symbols (ie. %longdate%) are macros that display a computed value when printed. You can remove the specified values (the above image shows the default values), or enter any text of your choosing.

The following table displays the macro values available:

%page%	Current page number
%total%	Total page count
%time%	The current time (displayed using the short form (without seconds) according to the user's current regional language settings.
%date%	Today's date - displayed using the short date format according to the user's current regional language settings.
%longdate%	Today's date - displayed using the long date format according to the user's current regional language settings.

Note: The Header left and Footer left fields default to the Item Title and "Ultra Recall" respectively. You can change the defaults by entering your own value in these fields. To prevent these fields from printing, enter a single space in the respective field. The fields can be reset to the default value by removing the value from the field. The next time Print Preview is used, the default value will then be restored.

4.5.25 Progress

This dialog is displayed whenever a cancellable operation is occurring.

The caption of the dialog (ie. *Importing Documents* in the above image) indicates the currently executing operation.

The following buttons allow the user to either cancel or halt the current operation:
* **Cancel/Stop**: clicking this button will either cancel or stop the current operation depending on its caption. *Cancel* means all work done will be discarded, *Stop* will discontinue the operation but preserve any work already completed (such as during an import).
* **Help:** clicking **Help** will display the help file (opening to this entry).

Note: a *Stopped* operation can also be fully canceled, by doing a subsequent undo.

See Also:
* Synchronize
* Import
* Undo/Redo

4.5.26 Reminder Dialog

When an Info Item Reminder is due, Ultra Recall can be configured to display this dialog to notify you. In addition, a Reminder tray notification balloon can be displayed in addition, or before the Reminder Dialog is displayed.

Note: A single **Reminder Dialog** displays the due Reminders from all running instances of Ultra Recall , consolidating your reminders in a single notification window.
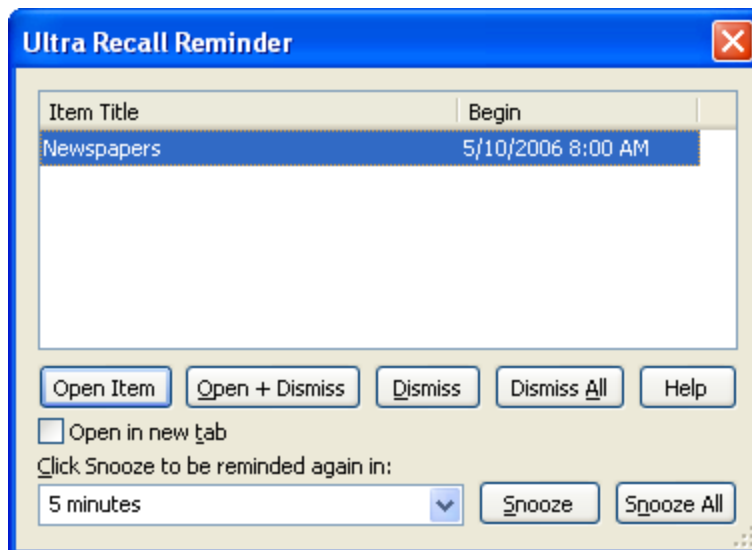
From the dialog, you can manage the displayed Reminders with the following buttons:
* *Open Item*: Navigate to the selected Info Item in the associated instance of Ultra Recall. If the *Open in new tab* checkbox is checked, the item will be opened in a new tab.
* *Open + Dismiss:* Navigate to the selected Info Item and immediately **dismiss** the reminder in one step. If the *Open in new tab* checkbox is checked, the item will be opened in a new tab.
* *Dismiss*: Dismiss the selected reminder (which will advance to the next Recurrence if this attribute is specified).
* *Dismiss All*: Dismiss all displayed reminders in their associated instance(s) of Ultra Recall.
* *Snooze*: Reset the reminder into the future by the specified snooze delay amount.
* *Snooze All*: Reset all displayed reminders into the future by the specified snooze delay amount.

Note: Columns can be resized by clicking and dragging the right edge of the column in the header. Columns can be reordered by dragging and dropping to the desired position. Columns can be shown or hidden by right-clicking in the header and selecting a column name.

See Also:
- Reminders
- Recurrences
- Reminder Options
- Reminder Notification

4.5.27 Spelling Options

Ultra Recall provides extensive spell checking capabilities, including suggested corrections, additional dictionaries, and more. Many different **Spelling Options** are available, which are configured on the **Spelling Options Dialog**.
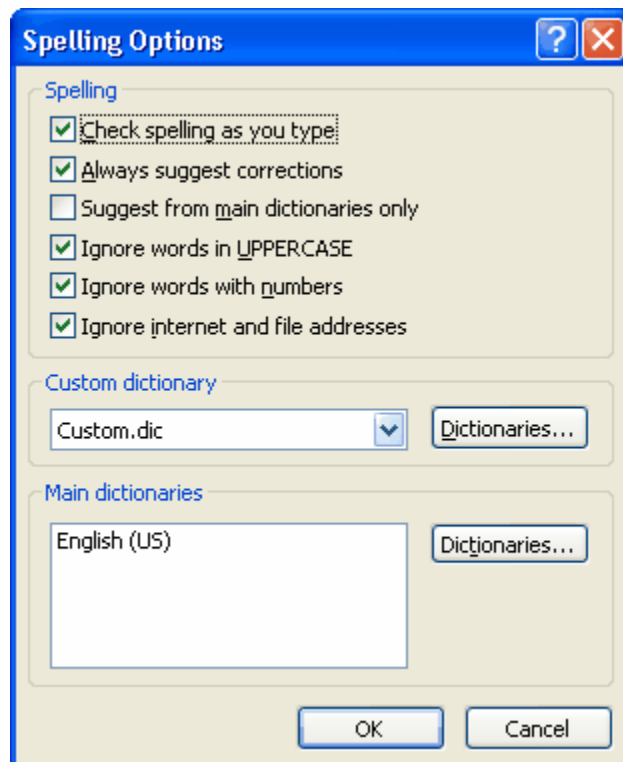
Spelling
Check spelling as you type: Checking this box will warn you about potentially misspelled words with a red, wavy underline. This wavy underline will not appear when the Info Item is printed, it is only displayed on the screen.

Always suggest corrections: Checking this box will command Ultra Recall to make suggestions when it detects that a word has been misspelled.

Suggest from main dictionaries only: Checking this box will command Ultra Recall to only make spelling suggestions from the main dictionaries only.

Ignore words in UPPERCASE: This feature is self-explanatory.

Ignore words with numbers: This feature is self-explanatory.

Ignore internet and file addresses: Checking this feature will command Ultra Recall to not spell check any text it identifies as an internet or file address.

Custom Dictionary
You can add your own words to the custom dictionary. These additional words are stored in a dictionary file named *Custom.dic* located in the user's Ultra Recall data folder (typically *C:\Documents and Settings\<UserName>\Application Data\Kinook Software\UltraRecall*).

Main Dictionaries
All the dictionary files found in <Ultra Recall install path>\Dictionaries are loaded at startup of Ultra Recall and used for spell-checking. The English dictionary is installed with Ultra Recall, additional dictionaries can be downloaded and installed from the Kinook Software website.

How to access:
* Menu Bar: *Tools | Spelling Options*
* Keyboard: *Ctrl+F7*

4.5.28 Tabs

The **Tabs** dialog is used to set tab stops for the current selection in the Rich Text Editor.

Enter a tab stop width and click *Set* to add a tab stop (entering a single tab stop will set all tab stops to the specified width). Select a tab stop and click *Clear* to remove all tab stops. Press *Clear All* to remove all tab stops. Click *OK* to update tab stops to the specified values.

Note: Tab stops are specified in twips (1440 twips = 1 inch).

How to access:
* Menu Bar: *Format | Tabs*

4.5.29 Text Statistics

The **Text Statistics Dialog** is available when a Pane that contains rich text has the focus. It contains the number of *lines*, *words,* and *characters* that are contained in the rich text of the focused Pane.
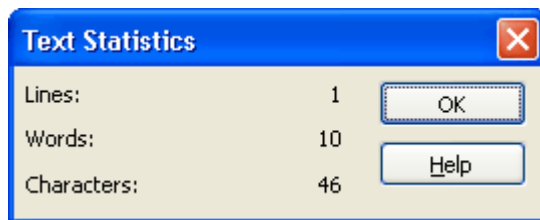
How to access:
* Menu Bar: *Tools | Text Statistics...*
* Keyboard: *Alt+F7*

4.5.30 Text Style

The **Text Style** dialog is used to change the text style of (or create a style for) the current selection in the Rich Text Editor. A style is all the font settings (font name size, bold, italics, underline, etc.) of the text.

To create a new or update an existing style, type or select the style name, check the Save checkbox, and click OK. To update the selected text to an existing style, select the name in the Style field and

click OK.

How to access:
- Menu Bar: *Item | Format | Style*
- Format Toolbar

4.6   Wizards

Wizards are multi-page dialogs that step the user through a feature or process of an application.

The following **wizards** are available in Ultra Recall:
- Import Wizard
- Export Wizard

4.6.1   Import Wizard

An **Import Dialog** is provided which allows importing data from a variety of sources. The **Import Dialog** functions as a wizard, assisting in importing information in a step-by-step manner.

The first page of the **Import Dialog** wizard is a welcome screen that can be turned off for future uses by checking the *Don't show this page next time* check box).

The next wizard page is the Select Source page.

How to access:
- Menu Bar: *File | Import...*
- Item Toolbar button

The next Import Dialog page: Select Source page

4.6.1.1   Select Source

The **Select Source** page is where you select the specific import type information you intend to import into Ultra Recall.

The next Import Dialog page displayed depends on your selection on this page. Use the links below to view the specific details on the various import types:
- Internet Explorer favorites (same as A folder but defaulting to the Favorites folder)
- Firefox, Netscape or Mozilla bookmarks
- My Documents (same as A folder but defaulting to the My Documents folder)
- Files
- A folder
- A web page
- A delimited text file (such as CSV files)
- A text or rich text (RTF) file
- An XML file (OML/OPML)
- An ActionOutline file
- A TreePad file
- An mbox file

- **Use saved settings:** All the wizard settings from a previously saved import session can be loaded by choosing the named set in this combo box (<Default> is the name of the default set). *Note:* This feature is available in the Professional edition only, and only when running in non-USB mode.

Note: Importing of CSV, XML, and splitting of text/RTF files available in Professional edition only.

You can easily import your **Firefox, Netscape or Mozilla bookmarks** using the Import Dialog.

Just open the Import Dialog, choose *Firefox, Netscape or Mozilla bookmarks*, then click *Next*, the following entry field will be displayed:

Bookmarks file to import: Manually enter or select a path using the ⬚ button to a Firefox, Netscape or Mozilla bookmarks file. As the caption states, you can also use drag & drop or copy & paste to specify a different Favorites folder to import.

Options
Recreate bookmark hierarchy in Ultra Recall: Uncheck this box (checked by default) to create a flat list of Info Items for each bookmark instead of recreating the hierarchy of the original bookmarks.

Store web page contents in Ultra Recall: Check this box (unchecked by default) to store the actual web pages associated with the bookmarks in Ultra Recall. Leaving it unchecked will create Info Items linked (only) to the web page URL.
Note: The following checkbox is only enabled when the Store web page contents in Ultra Recall box is checked.

Delete bookmark file to Recycle Bin after import: Check this box to delete the source bookmarks.html file after the contents have been moved into Ultra Recall (not checked by default).

Do not process documents for text, summary or icon information: Check this box to prevent any data from being retrieved when importing your **bookmarks**. This will prevent any text or summary attributes from being retrieved and the resulting Info Items will use the default icon (instead of retrieving any related icon information).

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

Note: the Firefox extension can also be used to import web pages from Firefox.

To import a manually specified list of files or documents, just open the Import Dialog, choose *Files*, click *Next* and the following entry fields will be displayed:

Files to import: Enter one filename per line, browse to select one or more files, or drag & drop or copy & paste files from Windows Explorer into this entry field. The *browse button* is used to browse to your file system.

Options
Store file contents in Ultra Recall: Checking this box instructs Ultra Recall to store the contents of each file imported within the Ultra Recall Info Database. If this option is unchecked, the Info Items created for each file processed will be linked to the file's *URL* and the contents will not be stored within the database.

Note: The following checkbox is only enabled when this check box is checked.

Move files (delete local files and folders to Recycle Bin after import): This check box is self explanatory.

Do not process documents for text, summary or icon information: Check this box to prevent any

data from being retrieved when importing **files**. This will prevent any text or summary attributes from being retrieved and the resulting Info Items will use the default icon (instead of retrieving any related icon information).

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

See Also:
- Capturing Information
- Capturing with Drag and Drop
- Capturing with Copy and Paste
- Explorer Integration
- Importing Data

4.6.1.1.3 A folder

To import the contents of a single **folder**, just open the Import Dialog, choose *A folder*, click *Next* and the following entry fields will be displayed:

Folder to import: Manually enter or select a folder path using the [...] button to open a helper dialog to specify an alternate folder. As the caption states, you can also use drag & drop or copy & paste to specify a different Favorites folder to import.

Folder Options
Don't import files (just create a link to the folder in Ultra Recall): If this box is checked Ultra Recall won't create Info Items for each contained file, but will simply create a single Info Item that is linked to the folder's URL.
Note: if this box is checked, the other check boxes in this group are not applicable and will be disabled.

Process files in subfolders (recursive): Checking this box will instruct Ultra Recall to recursively process files in the subfolder in the specified folder. If not checked, only the files in the folder specified will be imported.
Note: If this box is checked, the following check box is not applicable and will be disabled.

Recreate directory structure in Ultra Recall: If the *Process files in subfolders (recursive)* box is checked, then you have the option of preserving the original folder structure or just creating a flat list of file Info items in one folder. Checking this box (the default value) will preserve the original folder layout, unchecking it will create a flat list of files Info Items.

Include hidden and system files: As the name implies, checking this box will include hidden and system files (default is not checked).

File Options:
Store file contents in Ultra Recall: Checking this box instructs Ultra Recall to store the contents of each file imported within the Ultra Recall Info Database. If the box is unchecked, the Info Item created for each file will only be linked to the file's *URL*.
Note: The following checkbox is only enabled when this check box is checked.

Move files (delete local files and folders to Recycle Bin after import): This check box is self explanatory.

Do not process documents for text, summary or icon information: Check this box to prevent any data from being retrieved when importing **folders**. This will prevent any text or summary attributes from being retrieved and the resulting Info Items will use the default icon (instead of retrieving any related icon information).

The previous Import Dialog page: Select Source

The next Import Dialog page: Select Destination

See Also:
- Folder Synchronization
- Synchronization
- Import (more) options

4.6.1.1.4 A web page

To import the contents of a single web page, just open the Import Dialog, choose *A web page*, click *Next*, and the following entry fields will be displayed:

Web page to import: Manually enter the URL of a web page, or use drag & drop or copy & paste from a browser or text editor onto the edit control.

Store web page contents in Ultra Recall: If this box is checked, the web page will actually be stored in your Ultra Recall Info Database, providing you access to the web page even if it later is removed from the internet or while you are disconnected from the internet.

Do not process documents for text, summary or icon information: Check this box to prevent any data from being retrieved when importing a **URL**. This will prevent any text or summary attributes from being retrieved and the resulting Info Item will use the default icon (instead of retrieving any related icon information).

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

4.6.1.1.5 A delimited text file

Any file or clipboard data containing delimited text can be imported as Info Items with corresponding Attributes using the this type of File Import. This feature is very useful for importing contacts from an email application or contact database, a spreadsheet application, etc.

The data in the delimited file simply needs to be separated with a consistent character (by default a comma [,] but any symbol such as a TAB or ~ could be specified and used).

To import the contents of a delimited text file, just open the Import Dialog, choose *Delimited text file*, click *Next* and the following entry fields will be displayed:

Delimited text file to import: Manually enter or browse to the file and path of a delimited text file, or use drag & drop or copy & paste from Windows Explorer onto the edit control.

Load Clipboard: When clicked, any text found on the clipboard is saved to a temporary text file, the filename field updated to this temporary file, and the delimiter changed to <TAB> (since Excel and Word copy tabular clipboard data using Tab as the delimiter). This provides a convenient way to quickly import delimited data copied to the clipboard from other applications.

Delimited Fields and Settings

When a valid file has been selected in the *Delimited text file to import* field, the Input Field -> column of the mapping control (displayed above) will populated with the either the values of the first row of data or "Field 1" .. "Field N" (where N is the number of columns in the first row of data). The second column is used to map the input fields to specific attributes for the import.

Input Field ->: This column is populated with either the names of the input columns (if *First row contains field names* is checked), or "Field 1" ... "Field N" (where N is the number of columns in the first row of data if not checked). Values in this column are not editable.

Attribute: This column is used to assign existing Attributes to populated with the *Input Field* -> values when the file is imported. The Attribute names can be selected in a drop-down control displayed in this column. For a Yes/No type attribute, use a non-zero value (i.e., 1) for Yes and 0 for No in the CSV file.

Skip missing values: Checking this box will not create Attributes for input fields with no value provided.

First row contains field names: Checking this box will repopulate the *Input Field* -> based on *Field Delimiter* and *Text Qualifier* settings displaying the values found in the first row of data. The first row of data won't be imported when this box is checked. If the box is unchecked, the *Input Field* -> column will be repopulated with "Field 1" .. "Field N" as described above and all rows (including the first) will be imported.

Field Delimiter: The value specified in this field is used to identify the separator between delimited values (for a CSV or comma-separated file this is a comma). This value is required.

Text Qualifier: When importing values that contain the delimiter character (such as Kinook Software, Inc. when the delimiter is a comma), many applications will qualify the entire block of text with a different character (typically a double quote, such as this example: "Kinook Software, Inc.").

Note: to import multiple user-defined keywords, use a semi-colon delimiter between the keywords in this csv "value", and map the column to the "Keywords (user-defined keyword)" virtual attribute.

Template: The Info Items created during the import will be based on the template specified in this combo control.
Note: If the Contact or Contact derived template is selected, the Item Title attribute can't be mapped, as these Templates do use a combination of the First Name, Last Name and/or Company attributes to compute the title.

Attributes Editor (button): Clicking this button will display the Attributes Editor dialog, which can be used to add appropriate Attributes for use by the Import process.

Options
Delete Delimited text file to Recycle Bin after import: This check box is self explanatory.

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

Note: Available in Professional edition only.

4.6.1.1.6 A text or rich text (RTF) file

Files containing plain or rich text (rtf) can be imported using this type of File Import. In addition, this File Import capability provides a way to split the file into multiple Info Items when imported, based on the delimiter you define.
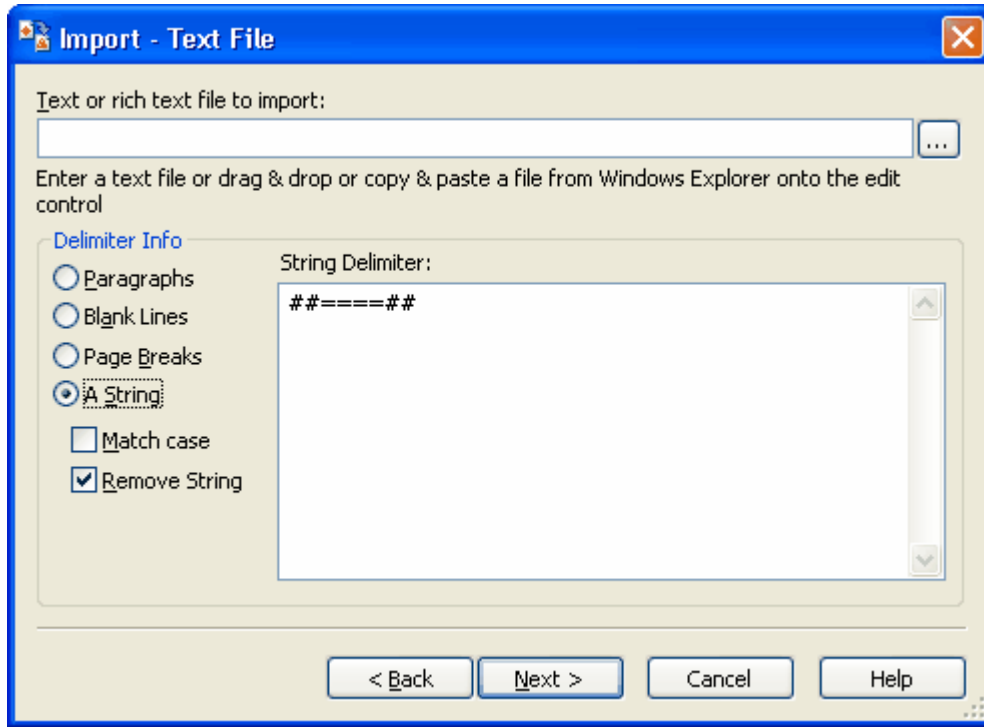
Text or rich file to import: Manually enter the file and path of a text or rich text file, or use drag & drop or copy & paste from Windows Explorer onto the edit control.

Delimiter Info:

Paragraphs: This delimiter type provides a way to create a new Info Item for each x number of paragraphs contained in the text/rich text file. The number of paragraphs is specified by the user with the *Count:* text box.

Blank Lines: This delimiter type provides a way to create new Info Items for each section of content between the specified number of blank lines. The number of blank lines to use as the delimiter is specified by the user with the *Count:* text box.

Page Breaks: This delimiter type provides a way to crate new Info Items for each section of content between hard page breaks.   The number of pages to use for each new Info Item is specified by the user with the *Count:* text box.
Note that Ultra Recall will only identify <u>hard</u> (explicit) page breaks and not <u>soft</u> page breaks based on page length.

A String: This delimiter type provides a way to provide a custom delimiter (entered manually in the String Delimiter text box). Ultra Recall will create a new Info Item for each section of content delimited by the provided delimiter.
- **Match case:** Checking this box will instruct Ultra Recall to do a case-sensitive search for the delimiter string.

- **Remove String:** Checking this box will instruct Ultra Recall to NOT include the delimiter string in the created Info Items.

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

Note: Available in Professional edition only.

4.6.1.1.7 An XML File

XML is quickly becoming a standard file format for representing diverse data while maintaining the relationships and structure of that data. Two XML formats are becoming widely used for outline type data, these include OPML (www.opml.org/) and the derivative OML (oml.sourceforge.net/).

A flexible import wizard for OML/OPML and other XML files is provided with this option. XML *attributes* of *<outline>* and *<item>* elements are imported, with the *<outline>* elements defining the relationships between "Items". Note: *<item>* elements actually contain Ultra Recall Attributes, which can be somewhat confusing (this is due to the element name choice made by the OML designer).

File to import: Manually enter the file and path of a XML, or use drag & drop or copy & paste from Windows Explorer onto the edit control.

XML -> Attribute mappings:

When a valid xml file is specified in the **File to Import** text box, the above grid will populate with the XML fields (element *attribute* names), and XML Field Types. If the xml *attribute* in the first column is part of an *<outline>* element, the value is *Attribute*, otherwise the *attribute* is part of an *<item>* element, and is labeled *Element*.

When the first two columns are populated (automatically when a valid xml is specified), Ultra Recall will also auto-match existing attributes with names matching the XML Fields automatically. You can assign additional or unassign mappings with the provided drop-down combo in the *Destination Attribute* column.

Skip Empty: checking this box will prevent Ultra Recall from adding Attributes for empty xml values.

Attributes Editor (button): Clicking this button will display the Attributes Editor dialog, which can be used to add appropriate Attributes for use by the Import process.

Options
Store file contents in Ultra Recall: Checking this box instructs Ultra Recall to store the contents of each Document template-based Info Item created during the import. If the box is unchecked, the each Document template-based Info Item created only link to the *URL* provided.

Delete XML file to Recycle Bin after import: This check box is self explanatory.

Do not process documents for text, summary or icon information: Check this box to prevent any data from being retrieved when importing **files**. This will prevent any text or summary attributes from being retrieved and the resulting Info Items will use the default icon (instead of retrieving any related icon information).

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

Note: Available in Professional edition only.

4.6.1.1.8 An ActionOutline file

ActionOutline (*.ao) files can be imported using this type of File Import.

ActionOutline file to import: Manually enter the file and path of an ActionOutline file, or use drag & drop or copy & paste from Windows Explorer onto the edit control.

Store documents and web page contents in Ultra Recall: Checking this box instructs Ultra Recall to store the contents of referenced files or web pages within the Ultra Recall Info Database. If the box is unchecked, the Info Items created for each file processed will be linked to the original *URL/path*.

Do not process documents for text, summary or icon information: Check this box to prevent any data from being retrieved when importing documents/web pages. This will prevent any text or summary attributes from being retrieved and the resulting Info Items will use the default icon (instead of retrieving any related icon information).

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

4.6.1.1.9 A TreePad file

TreePad files (.hjt or .htmhjt file extension -- save .tpd format as .hjt) can be imported using this type of File Import.

Treepad file to import: Manually enter the file and path of a TreePad file, or use drag & drop or copy & paste from Windows Explorer onto the edit control.

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

4.6.1.1.10 An mbox file

Several email clients store their emails using the **mbox file format** (RFC-822 text file).

Some email clients known to use the **mbox file format**:
- Eudora: *.mbx files
- Netscape mail client: files with no extension
- Thunderbird (Mozilla email client) and Postbox: files with no extension

Files in the **mbox file format** can imported using this File Import.

Mbox file to import: Manually enter the file and path of an mbox file, or use drag & drop or copy & paste from Windows Explorer onto the edit control.

The previous Import Dialog page: Select Source
The next Import Dialog page: Select Destination

Note: The Thunderbird/Postbox extension can also be used to import messages from Thunderbird and Postbox.

4.6.1.2   Select Destination

After any source specific settings are specified, the final **Select Destination** window will be displayed where you specify whether the imported Info Items are parented to the currently selected Info Item or the *Imported Items* Info Item.

Create Logically linked items for duplicate URLs: checking this box will prevent multiple Info Items for the same Info Item from be created during the import. When checked Ultra Recall will use the following rules to prevent duplicate URLs:
- if an Info Item with this *URL* value already exists* where the new Info Item will be created, the *URL* is skipped
- if an Info Item exists at some other location for this *URL**, a logically linked Info Item will be created at the new location
- if a new logically linked Info Item at this location would be a recursive link, you will be prompted to stop or skip the *URL* (unless the *Automatically skip unreachable URLs* checkbox is checked, in which case it will skip it automatically)
- if no Info Item exists with the specified *URL**, a new Info Item will be created in the normal manner

Automatically skip unreachable URLs: if this option is not checked, the Import Error Notification dialog will be displayed when an unreachable *URL* is encountered during the import. This dialog will not be displayed when this option is checked (and the *URL* will automatically be skipped for importing).

Save settings as: Saves all the current wizard settings under the name entered in this field, for use of these options again at a later time. *Note:* This feature is available in the Professional edition, and only when running in non-USB mode.

Note: the default value for both options is configured at *Tools | Options | Import (more)*.

*Ultra Recall does a case-insensitive comparison of the imported URL and any existing URL attributes. Ultra Recall also properly handles relative paths when comparing, but does not handle long versus short (DOS 8.3) paths.

The previous Import Dialog page:
- Internet Explorer favorites (same as A folder)
- Firefox, Netscape or Mozilla bookmarks
- My Documents (same as A folder)
- Files
- A folder
- A web page
- A delimited file
- An XML file
- Folder Synchronization
- Import (more) options

4.6.1.3   Import Error Notification

If Ultra Recall is unable to import a specified document, the **Import Error Notification** dialog will be displayed.

Ultra Recall

⚠️ Error importing file 'www.bad.url': Url not found. Continue processing remaining files?

[Yes] [No]
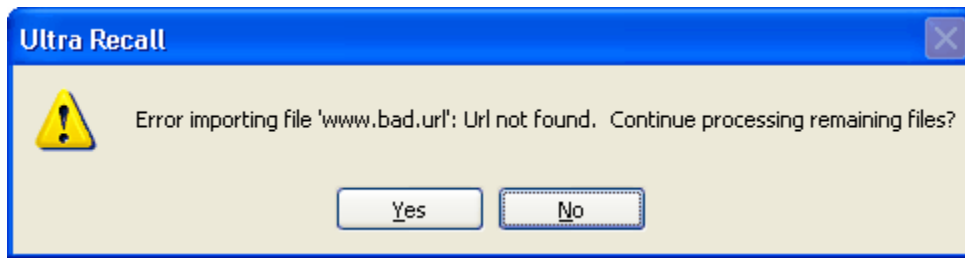
Clicking *Yes* will resume importing the remaining specified documents, clicking *No* will terminate the import.
Note: hold down the Shift key when clicking Yes to cause Ultra Recall to automatically answer YES to subsequent import errors during that import.

4.6.2 Export Wizard

An **Export Dialog** is provided, which allows you to easily export some or all of the information stored in an Ultra Recall Info Database to your file system. Using the wizard interface provided with the **Export Dialog**, Info Items can be exported in the following formats:
* Individual files to a folder
* A single text file containing a comma-separated list of attribute values
* An XML file
* HTML files
* Text items combined as a single RTF file

The first page of the **Export Dialog** wizard is a welcome screen that can be turned off for future uses by checking the *Don't show this page next time* check box).

How to access:
* Menu Bar: *File | Export...*
* Item Toolbar button

The next Export Dialog page: Select Output Type

4.6.2.1 Select Output Type

This wizard page is where you determine what type of output the export process will create:

* **Documents and item rich text to a folder:** This option will export documents (for Info Items for document/web pages) or rich text (for other Info Items) to files in a folder (that you specify).
* **Item attributes to a delimited (CSV) text file:** This option will export selected attributes for the selected Info Items to a comma-separated text file.
* **Items to an XML (OML) file:** This option will export the selected Info Items (and user-specified Attributes) to an XML (OML) file, optionally including RTF files for text/notes of appropriate Info Items).
* **Text items to a rich text (RTF) document:** This option will export the rich text for appropriate Info Items to a single RTF file, optionally including the Item Title, Notes, and separated by hard page breaks.
* **Text notes to a rich text document:** This option will export any item note rich text for appropriate Info Items to a single RTF file, optionally including the Item Title and separated by hard page breaks.
* **Documents and item rich text to HTML:** This option will export documents (for document and web page Info Items) and other Info Items in HTML format.

* **Use saved settings:** All the wizard settings from a previously saved export session can be loaded by choosing the named set in this combo box (<Default> is the name of the default set). *Note:* This feature is available in the Professional edition only, and only when running in non-USB mode.

Notes:
- Basic OPML can also be exported with the XML style export, by de-selecting all the attributes on the Select Attributes page of the Export Wizard. Just the basic title, create date and update attributes (which are always exported) will be included in the exported OPML file.
- Export of multiple items and notes to single RTF file available in Professional edition only.
- Drag/drop and copy/paste can also be used to export documents and item rich text to other applications.

Previous Export Dialog page: Export Overview
Next Export Dialog page: Select Destination page (when exporting to a folder), or the Select Attributes page (for other types).

4.6.2.2   Select Attributes

This Wizard page is displayed when exporting Attributes values as a comma-delimited file, or when exporting to XML.
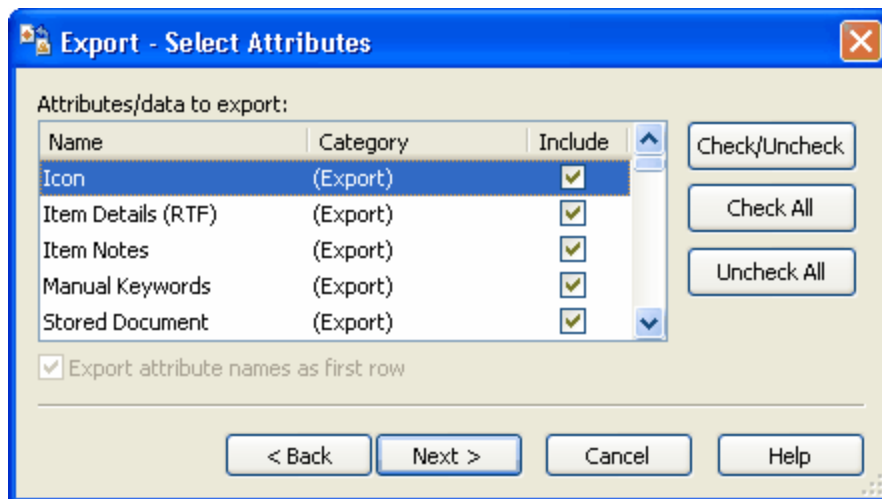
XML Export Features:
When exporting to OML (XML), rich text, documents and icons can also be exported. Several special entries on this wizard page allowing the user to determine if they are also exported. These entries are listed under the "*(Export)*" category, and include:
- **(Export) - Icon:** the icons for the exported Info Items will be stored in a subfolder named with the xml filename + "*_Icons*", and referenced in the output OML file.
- **(Export) - Item Details (RTF):** the body of exported Info Items based on Text templates will be saved as RTF files in a subfolder named with the xml filename + "*_StoredContent"* and referenced in the output OML file.
- **(Export) - Item Notes:** the notes of exported Info Items will be saved as RTF files in a subfolder named with the xml filename + "*_Notes"* and referenced in the output OML file.
- **(Export) - Stored Document:** any stored documents of exported Info Items will be saved to a subfolder named with the xml filename + "*_StoredContent*" and referenced in the output OML file.

Choose the Attributes you want to export by checking the *Show* column checkbox. You can also use the buttons provided:
- **Select/Deselect:** clicking this button will toggle the *Show* value for the selected Attributes
- **Select All:** clicking this button will select all Attributes
- **Select None:** clicking this button will deselect all Attributes

CSV Export Features:

When exporting to a CSV file, the following option is available:

- **Export attribute names as first row:** Checking this box will write the attribute names as the first row of the exported CSV file.

Previous Export Dialog page: Select Output Type
Next Export Dialog page: Select Destination page

See Also:
- Exporting to XML

4.6.2.3   Select Destination

Four types of Export output are available:

- **Documents and item rich text to a folder:**
In this mode, each eligible Info Item (all except those based on the Contact Template Group) is recreated as a file within the folder specified.
Note: if the item contains Item Notes, these are also created as a separate, related file with an .rtf extension.

- **Item attributes to a comma delimited file**
In this mode, a single comma-delimited file containing the Attribute values specified for the exported Info Items is created.

- **Info Items to OML (XML)**
In this mode, a single OML (XML) file is created containing the attributes specified is created and optionally additional files are created for rich text, notes, stored documents and icons in appropriately named subfolders (and referenced by the OML file).

- **Text Items to a rich text (RTF) document**
In this mode, a single rich text (RTF) file is created containing the rich text of Info Items based on the Text (or derived from the Text) template.
   RTF Specific Options:
   - **Include item titles:** If this option is checked, the each Info Item title will be exported at the start of each rich text section.
   - **Insert page breaks between exported items:** If this option is checked, a single hard page break will be inserted between the rich text of each Info Item.
   - **Include item notes:** If this option is checked, the item's notes (if any) will be exported at the end of each rich text section.

Note: Export of multiple items and notes to a single RTF file available in Professional edition only.

Shared Options:
- **Export child items (recursive):** This option determines whether a recursive export is done (whether child items and their children are also exported).

- **Open Explorer Window after export:** If this option is checked, Windows Explorer will be launched by Ultra Recall for the export location when the export is complete.

- **Save settings as:** Saves all the current wizard settings under the name entered in this field, for use of these options again at a later time. *Note:* This feature is available in the Professional edition, and only when running in non-USB mode.

Previous Export Dialog Page: Select Output Type or Select Attributes page depending on the output type selected.

4.7   Caption Bar

The **Caption Bar** is the band across the top of the Ultra Recall application (almost all Windows applications have one), which is always present and enables you to:
- Reposition the Ultra Recall application
- Minimize or maximize the Ultra Recall application

4.8   Status Bar

The **Status Bar** is the optional band across the bottom of the Ultra Recall application. You show or hide the **Status Bar** based on whether the Menu Bar entry [View | Status Bar] is checked or not.

Ready	Children: 0	Parents: 1	Keywords: 9	Row 1, Col 14				READ
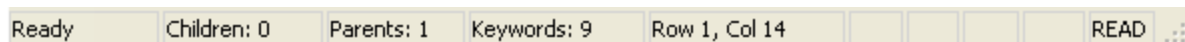
Each section of the Status Bar contains specific information (from left to right):
1st: Indicates the current status of any pending operation (such as retrieving a web page)
2nd: Lists the number of Info Items in the Related Items Pane
3rd: Lists the number of Info Items in the Item Parents Pane
4th: Lists the number of keywords for the selected Info Item (blank for multiple selection)
5th: Indicates the row and column of the cursor while editing text/rich text.
6th: Indicates whether in INSERT [INS] or OVERWRITE [OVR] mode while editing text/rich text.
7th: *CAPS lock* indicator: Either blank or CAP
8th: *Num lock* indicator: Either blank or NUM
9th: *Scroll lock* indicator: Either blank or SCRL
10th: *Read-only* indicator (read-only file, no user write rights, running in viewer, or in viewer mode due to expired license [also a startup notification in this case]): Either blank or READ

5   Commands and Procedures

5.1   Menus

The Menu Bar provides access to the many features and capabilities of Ultra Recall. By default it is located near the top of the application and consists of a number of words that categorize the different functionality of Ultra Recall.

To access the different category or submenu, simply click on the word with the mouse, or click the *Alt* key then the letter underlined in the word. A submenu will drop down providing access to each different function available in the application.

The different submenus are:
- File
- Edit
- View
- Go
- Favorites
- Tab
- Item
- Format
- Tree
- Tools
- Window
- Help

Keyboard shortcuts for most Menu Bar entries, and each shortcut is listed with the menu items. Most of these shortcuts can be modified by the user, via the Customize Dialog.

See Also:
- Customize Dialog
- Keyboard Shortcuts

5.1.1   File Menu

The File menu contents:

Menu Actions	Action Descriptions
New	Creates a new Ultra Recall Info Database.
Open	Opens an existing Info Database. Ultra Recall Info Database files have a .urd extension.
Close	Close the current Info Database.
Save	Saves the current Info Database.
Save As	Saves the current Info Database to a specified filename.
Print	Prints the currently selected Info Item*.
Print Preview	Previews the currently selected Info Item*.
these are enabled only when a single Info Item is selected.
Import	Starts the Import Wizard.
Export	Starts the Export Wizard.
Send	Initiates an email with the selected Info Items as attachments.
Properties	Displays statistics of the current Info Database.
Recent Files	Opens a recently opened Info Database.
Exit	Exits Ultra Recall.

5.1.2   Edit Menu

The Edit menu contents:

Menu Actions	Action Descriptions
Undo	Reverses the action last performed by the user in Ultra Recall.
Redo	Re-executes the last action that previously undone by the user via Undo.
Cut	Cuts the selection and moves it to the clipboard.
Copy	Copies the selection to the clipboard.
Copy *<extended>*	Performs the specific Copy and Paste to other applications action for the active Pane.
Paste	Pastes data from the clipboard into the Info Database.
Paste Special	Displays the *Paste Special* submenu.
Paste Special | Copy	Paste a copy of the Info Items and their child Info Items (all logical links are preserved).
Paste Special | Copy Single	Paste a copy of the Info Items on the clipboard (excluding any child Info Items)
Paste Special | Duplicate	Paste a duplicate of the Info Items on the clipboard (only logical links between duplicated Info Items are preserved).
Paste Special | Paste Text	Explicitly paste text on the clipboard into Ultra Recall.
Paste Special | Paste Text One Item Per Line	Create a text Info Item for each non-blank line of text on the clipboard.
Paste Special | Paste Rich Text	Explicitly paste Rich Text* on the clipboard into Ultra Recall.
Paste Special | Paste Rich Text With Titles	Explicitly paste Rich Text* on the clipboard into Ultra Recall.

Paste Special | Paste HTML	Explicitly paste HTML on the clipboard into Ultra Recall.
Insert	Inserts an entry (of the appropriate type for the current window)
Insert Date+Time	Inserts the current date+time at the current location, formatted according to user options.
Delete	Deletes the selected entries (of the current window)
Rename	Renames the current Info Item in the Data Explorer Pane (when applicable).
Properties	Displays the Attribute Properties Dialog from the Item Attributes Pane
Restore	Restores the selected Info Items (in the Recycle Bin) to their original location.
Select All	Selects all available entities in the currently selected Pane.
Search	Focuses the Quick Search item in the Search Pane.
Search for Selected Text	Starts a Quick Search for the selected text.
Find in Item...	Find text within currently focused text/rich text
Find Next	Navigates to the next *Find in Item* match
Replace	Replace text within currently focused text/rich text.

* When multiple Info Items containing rich text (Info Items based on the Text or Contact templates or their derivatives) are on the clipboard, these choices will combine the content into a new single Info Item.

5.1.3   View Menu

The View menu contents:

Menu Actions	**Action Descriptions**
Data Explorer	Focus the Data Explorer Pane
Item Details	Focus the Item Details Pane
Child* Items	Focus the Related Items Pane

* the menu entry changes to reflect the current caption of the Related items Pane

Other Windows	Show the *Other Windows* sub-menu
Other Windows | Search	Focus the Search Pane
Other Windows | Item Attributes	Focus the Item Attributes Pane
Other Windows | Item Notes	Focus the Item Notes Pane
Other Windows | Item Parents	Focus the Item Parents Pane
Other Windows | Form Details	Focus the detail area of a form
Other Windows | Web Address	Focus the Web Toolbar
Other Windows | Calendar	Display/focus the Calendar Pane
Other Windows | Next Pane	Focus the next Pane
Other Windows | Previous Pane	Focus the previous Pane
Other Windows | Close Current Pane	Close the current Pane
Other Windows | Toggle Auto hide	Toggle Auto hide for the current Pane
Other Windows | Toggle Floating/Docked	Toggle the current Pane between Floating and Docked
Stop	Stop current processing (for example, stop retrieving a web page)
Refresh	Reload the Dependent Panes for the currently selected Info Items
Scroll To Top	Make the topmost selected item the first visible Info Item in the Data Explorer Pane
Collapse or Expand	Collapse or Expand the current Info Item to show/hide its child items in the Data Explorer Pane (when Data Explorer Pane is selected and children exist)
Show Completed Items	Determines whether items with a Flag attribute value of Completed are shown
Categorized	Toggle whether Item Attributes are displayed categorized or not (in the Item Attributes Pane, only when it is selected)
Alphabetic	Toggle alphabetic sorting on/off for the current Pane.

Show Header	Turn the header in the Item Attributes Pane on/off (enabled when Item Attributes Pane is focused)
Zoom	Increases or decreases the zoom level in the rich text editor or internal browser view
Toolbars	Show the Toolbars sub-menu (you can toggle each toolbar on/off from the displayed sub-menu)
Status Bar	Toggle the display of the Status Bar (checked = yes, unchecked = no)
Layouts	Switches between the available Layouts
Choose Columns	Displays dialog allowing the Related Items Pane columns to be customized

Note: The Layout menu item can be "torn off" (by dragging and dropping the top part of the menu) and converted to a toolbar.

5.1.4   Go Menu

The Go menu contents:

Menu Actions	**Action Descriptions**
Back	Navigate to the previously selected Info Item
Forward	Navigate to the next selected Info Item
Up One Level	Navigate up one level from currently selected Info Item
Previous Match	Go to the previous search match (the previous search result or highlighted match in item text)
Next Match	Go to the next search match (the next search result or next highlighted match in item text)
Previous Item	Navigate to the previous Info Item in the current Pane
Next Item	Navigate to the next Info Item in the current Pane
Previous Sibling	Navigate to the previous sibling Info Item
Next Sibling	Navigate to the next sibling Info Item
First Sibling	Navigate to the first sibling Info Item
Last Sibling	Navigate to the last sibling Info Item
[List of forward/back history]	The *Item Titles* of up to 25 Info Items from both the Forward and Back navigation choices

5.1.5   Favorites Menu

The Favorites menu contents:

Menu Actions	**Action Descriptions**
Add to Favorites	Adds the currently select Info Item to the Favorites list
Organize Favorites	Display the Favorites Dialog
[Favorites list]	Allows direct access to any Info Item in the Favorites List. If Control is held down (or the New tab checkbox on the Favorites dialog is checked) when clicking on a Favorite, it will be opened in a new tab.

Notes:
· Hold down the Control key when clicking on a favorite to open it in a new tab.
· The Favorites menu can be "torn off" (by dragging and dropping the top part of the menu) and converted to a toolbar.

5.1.6   Tab Menu

The Tab menu contents:

Menu Actions	Action Descriptions
Next Tab	Activates the next tab
Previous Tab	Activates the previous tab
New Tab	Opens a new tab for the selected item
Close Tab	Closes the current tab
Close Other Tabs	Closes all tabs except the current one
Lock Title	Locks the title of the current tab to the title of the selected item
Go to Locked Item	Selects the item that this tab's title is locked to
Close Unlocked Tabs	Closes all tabs whose titles are not locked
[Tab list]	Allows direct access to any tab. Ctrl+Tab and Ctrl+Shift+Tab (default shortcuts) can also be used to switch between the tabs

5.1.7   Item Menu

The Item menu contents:

Menu Actions	Action Descriptions
Go To	When Info Items in the Related Items Pane or Item Parents Pane are selected, this will navigate to the same Info Item in the Data Explorer Pane
Open	If the carrot is not the same as the selection, make that Info Item the selection. It will always refresh the Dependent Panes on this selection.
Open in New Tab	Opens the selected item in a new tab.
Lock	Locks the item to prevent deleting or editing details and attributes.
Flag	Display the Flag sub-menu
[Flag sub-menu]	Click the flag you want to assign to the selected Info Items
Keywords	Display the Item Keywords Dialog
Keyword Selected Text	Creates a manual keyword or tag for the selected text
Synchronize	Reload Document and Folder Template Group Info Items from their original source (the *URL* Attribute location)
Store Contents	Toggle the Store Contents state of applicable Info Items
Open Document	Open the selected Info Item's stored document in the associated external editor/viewer (open linked document if Shift held down)
Edit Internally/Web Page/Text	Switch back to editing internally when editing an Info Item document externally or begin editing the current web page or highlighted rich text item internally
Open Shortcut	Launch the selected *URL/filename* (in the Internal Browser View, the *URL* Attribute in the Item Attributes Pane, in rich text, etc). If clicked while holding the *Shift* key, it will be launched externally. If no *URL/filename* is selected, the page will be launched externally.
Open Containing Folder	Opens the Windows folder containing the selected Info Item (internally if *folder* is in the internal browser view list, hold the *Shift* to force it to open externally in Explorer)
Show Explorer Menu	Show the Windows Explorer context menu for the selected Info Item's stored document for external editing (or context menu for linked document if Shift held down)
Create Desktop shortcut	Create a desktop shortcut to the selected Info Item in this Info Database
Copy Item Command-Line	Copies the command-line to launch the Info Item in this Info Database
Add Reminder	Adds the required + typical attributes used to define a Reminder on the selected Info Items
Rename To	Provides options for renaming the selected Info Item to the selected text, date, time or date+time.

Note: The Flag menu item can be "torn off" (by dragging and dropping the top part of the menu) and converted to a toolbar.

5.1.8 Format Menu

The Format menu displays the Rich Text and web page editing Formatting sub-menu

Menu Actions	Action Descriptions
Style	Use to change or edit the style of the current selection
Font	Display the Font Dialog to change the font of the current selection
Font Color	Change the font color of the selected text to the last assigned with the **Font Color** Format Toolbar button
Highlight	Change the highlight color of the selected text to the last assigned with the **Highlight** Format Toolbar button
Bold	Toggle whether the selected rich text is in bold
Italic	Toggle whether the selected rich text is in italics
Underline	Toggle whether the selected rich text is underlined
Strikeout	Toggle whether the selected rich text uses strikeout
Bullet	Toggle whether Bullets are displayed for the selected rich text
Numbering	Change the numbering format for the current selection
Decrease Indent	Unindent the current selection
Increase Indent	Indent the current selection
Word Wrap	Toggles wrapping of long lines of text
Align Left	Left align the selected rich text
Center	Center the selected rich text
Right Justify	Right justify the selected rich text
Justify	Fully justify the selected rich text
Single Spacing	Change the selection to single spacing
1.5 Line Spacing	Change the selection to 1 1/2 line spacing
Double Spacing	Change the selection to double spacing
Subscript	Subscripts the selection
Superscript	Superscripts the selected text
Insert Hyperlink	Inserts a Hyperlink into the Rich Text editor or edited web page
Insert Table	Inserts a table in the Rich Text editor

5.1.9 Tree Menu

The Tree menu contents:

Menu Actions	Action Descriptions
Insert Child	Inserts a child Info Item to the selected Info Item (if dropped down, displays the complete list of choices, otherwise it uses the Default Child Template)
Insert Sibling	Inserts a sibling Info Item to the selected Info Item (if dropped down, displays the complete list of choices, otherwise it uses the parent's Default Child Template)
Import Files	Displays a file dialog to choose files to import at the current selection.
Jump	Displays the Jump Dialog
Link/Move/Copy To	Displays the Link/Move/Copy Dialog to copy, move, or link the currently selected items to another location
Link/Move/Copy From	Displays the Link/Move/Copy Dialog to copy, move, or link items from another location to the currently selected item
Hoist	Hoist the tree to the selected item
Unhoist	Unhoist the tree to the root item

Move Up	Move the selected Info Items up in the Data Explorer Pane.
	Note: The manual ordering is available in the Related Items pane using the Tree Order virtual attribute.
Move Down	Move the selected Info Items down in the Data Explorer Pane
Move Left	Indent the selected Info Items
Move Right	Un-indent the selected Info Items
Sort Siblings	Undo any manual ordering (by moving items up or down) and sort siblings in ascending or (or in descending order if a chosen again).
	Note: A check next to this item indicates the siblings are sorted.
Expand All	Expand the selected Info Items and all their child Info Items
Collapse All	Collapse the selected Info Items and all their child Info Items
Collapse Tree	Recursively collapses all items in the entire tree (including items not currently displayed)
Refresh All	Refresh the selected Info Items and all their child Info Items

See Also:
- Create Info Item
- Direct Text Entry
- Relationships
- Tree Options

5.1.10 Tools Menu

The Tools menu contents:

Menu Actions	Action Descriptions
Spelling	Initiates a Spell-check of the current text
Spelling Options	Displays the Spelling Options Dialog
AutoCorrect Options	Display the AutoCorrect Dialog
Text Statistics	Displays the Text Statistics Dialog
Change Password	Displays the Change Password Dialog
Compact and Repair	Displays the Compact and Repair Dialog
Save All External Documents	Synchronizes any changes to externally edited documents
Attributes	Displays the Attribute Editor Dialog
Forms	Displays the Forms Dialog
Keyword Exclusions	Displays the Keyword Exclusions Dialog
Customize	Displays the Toolbar Customize Dialog
Options	Displays the Options Dialog
Quick Options	Provides quick access to common options. These menu items can also be assigned keyboard shortcuts, added to a toolbar, etc.

5.1.11 Window Menu

The Window menu contents:

Menu Actions	Action Descriptions
Next Database	Switches to the next open Info Database
Previous Database	Switches to the previous open Info Database
[Window list]	Allows direct access to any Info Database in the List.

5.1.12   Help Menu

The Help menu contents:

Help Actions	Action Descriptions
Contents	Show the Ultra Recall help file
Keyboard Map	Shows the key mappings for Ultra Recall commands
Buy Now	Purchase Ultra Recall
Register	Enter registration info after purchasing
Check for Updates	Checks to see if a newer version of Ultra Recall is available
About	Displays the version number and copyright

5.2   Keyboard Shortcuts

Ultra Recall provides very comprehensive keyboard support with **keyboard shortcuts** for all major functionality.

Default keyboard shortcuts are pre-defined and are documented throughout this help file, but most of them can also be customized by the user.

See Also:
- Customizing
- Default Shortcuts
- Favorites

5.2.1   Customizing

Keyboard shortcuts can be customized by the user via the Customize Dialog.

The following steps document how to customize a keyboard shortcut:
- Open the Customize Dialog
- select the *Keyboard* tab
- select the *category* and *command* you desire to modify
- To add a shortcut: enter the shortcut in the *Press new shortcut key field,* then click *Assign*
- To remove a shortcut: select the shortcut in the *Key assignments* field, then click *Remove*
- To reset to all shortcuts to their defaults: click the *Reset All* button

See Also:
- Customize Dialog

5.2.2   Default Shortcuts

The following entries document the predefined, **default keyboard shortcuts:**
- Global Shortcuts
- Data Explorer/Search Pane Shortcuts
- Item Attribute Pane Shortcuts
- Item Details Pane Shortcuts
- Related Items Pane Shortcuts
- Text Formatting

Note: Most of these shortcuts can be customized by the user if desired, just be aware that the shortcuts documented in this help file are for the predefined defaults.

See Also:

Keyboard Shortcuts
Customizing

5.2.2.1 Global Shortcuts

Many Ultra Recall keyboard shortcuts apply at all times in every part of the application. These are referred to as **global keyboard shortcuts**.

Shift+Win dows+Z	Activate Ultra Recall (system-wide shortcut; this keyboard shortcut can be configured in user options)
Ctrl+Win dows+V	Insert clipboard contents into Ultra Recall (system-wide shortcut available from any active application; the keystroke can be configured in user options)
F1	Display help for the current window or dialog

Go Back/Go Forward

Alt+Left Arrow	Go Back to the previously viewed Info Item or web page
Alt+Right Arrow	Go Forward to the next viewed Info Item or web page
Backspace	Go Up one Level (applies to Data Explorer Pane, Search Pane, Related Items Pane)

Pane Navigation

Ctrl+0	Go to the Search Pane
Ctrl+1	Go to the Data Explorer Pane
Ctrl+2	Go to the Item Details Pane
Ctrl+Shift+2	Go to the detail area of a form
Ctrl+3	Go to the Related Items Pane
Ctrl+4	Go to the Item Attributes Pane
Ctrl+5	Go to the Item Notes Pane
Ctrl+6	Go to the Item Parents Pane
Alt+C	Go to the Calendar Pane
Alt+D	Go to Web Toolbar
Ctrl+Shift+F	Go to the *system* Quick Search Info Item
Tab	Go to the next control in the current Pane or the next pane if at the last control
Shift+Tab	Go to the previous control in the current Pane or the previous pane if at the first control
Shift+F4	Close the focused Pane
F11 or Shift+F11	Toggle between the first and second layouts
Ctrl+Page Up	Go to next tabbed Pane (within tabbed Pane grouping)
Ctrl+Page Down	Go to previous tabbed Pane (within tabbed Pane grouping)

Tab Navigation

Ctrl+Tab	Go to the next Tab
Ctrl+Shift+Tab	Go to the previous Tab
Ctrl+T or Ctrl+Enter	Open a new Tab
Ctrl+W	Close current Tab
Ctrl+Shift+W	Close all tabs except current Tab
Ctrl	Hold down the Control key when opening a Favorite via the Favorites menu, toolbar, or keyboard to open in a new Tab

Info Database Operations

Ctrl+N	Start a new Info Database
Ctrl+O	Open an existing Info Database
Ctrl+S	Save changes to the Info Database
Ctrl+F4	Close the current Info Database
F6	Go to the next open Info Database
Shift+F6	Go to the previous open Info Database

Esc   1) Cancel current operation if one of these are happening:
- Web page is loading
- Search is being performed
- Related Items Pane is being populated

or

2) Hide the current Auto hidden Pane, then set focus to the Item Details Pane

or

3) Minimize Ultra Recall if the user option to *Minimize on Esc* is selected

Info Item Operations

Ctrl+Shift+R	Add a Reminder for the current Info Item
Ctrl+K	Display the Item Keywords Dialog for the selected Info Items
Ctrl+M	Toggle the stored contents state for the selected Info Items
Ctrl+P	Print the selected Info Items
Ctrl+J	Open the item's stored document (or linked document if not stored)
Ctrl+Shift+J	Launch the linked document (URL attribute)
Ctrl+.	Select the next Info Item in the active Selection Pane
Ctrl+,	Navigate to the previous Info Item in the active Selection Pane
Ctrl+E	Show the Explorer Menu for the selected Info Item stored document
Ctrl+Shift+E	Show the Explorer Menu for the selected Info Item linked document
Alt+Q	Create a desktop shortcut for the current Info Item
Ctrl+Shift+I	Copy the selected item command-line to the clipboard.

Clipboard Operations

Ctrl+C	Copy the current selection to the clipboard
Ctrl+Shift+C	Copy Extended (functionality and caption dependent on current Selection Pane)
Ctrl+Insert	Copy the current selection to the clipboard
Ctrl+X	Cut the current selection to the clipboard
Ctrl+V	Paste the contents of the clipboard at the current location
Ctrl+Shift+V	Paste a copy of Info Items on the clipboard.
Alt+Z	Insert current Date+Time in the current location

Favorites

Alt+F1	Display the Favorites dialog
Shift+F1	Add the current Info Item to favorites
Alt+0 thru Alt+9 or Alt+Shift+A thru Alt+Shift+Z	Go to the Info Item for the associated favorite
Ctrl+Alt+0 thru Ctrl+Alt+9 or Ctrl+Alt+Shift+A thru Ctrl+Alt+Shift+Z	Open the favorite in a new tab (a favorite will also open in a new tab with non-Ctrl combinations if the New tab checkbox on the Favorites dialog is checked)

Undo/Redo Operations

Ctrl+Z or Alt+Backspace	Undo the last change to the Info Database
Ctrl+Y	Redo the last undone change to the Info Database

Display Operations

F5	Refresh the Dependent Panes for the current selection
Ctrl+F5	Synchronize the selected Info Item
Shift+F5	Refresh the entire Ultra Recall application
F9	Show the Choose Columns Dialog

See Also:
- Data Explorer/Search Pane shortcuts
- Item Attributes Pane shortcuts
- Item Details Pane shortcuts
- Related Items Pane shortcuts

5.2.2.2   Data Explorer/Search Pane Shortcuts

These are the keyboard shortcuts that apply when the Data Explorer Pane or Search Pane has the focus:

Info Item Navigation:

Enter	Expand or collapse the selected Info Item
Left Arrow	Collapse selected Info Item if expanded or select parent item
Num -	Collapse selected Info Item
Right Arrow	Expand selected Info Item if collapsed or select first sibling
Num +	Expand selected Info Item
Up Arrow	Navigate Up and Left (not expanding nodes)
Down Arrow	Navigate Down and Right (not expanding nodes)
Alt+Home	Go to first sibling
Alt+Down Arrow	Go to next sibling
Alt+Up Arrow	Go to previous sibling
Alt+End	Go to last sibling
Shift+Left Arrow or Num /	Collapse selected Info Items and all child Info Items
Shift+Right Arrow or Num *	Expand selected Info Items and all child Info Items
Alt+J	Jump/navigate to another Info Item
Ctrl+Shift+H	Hoist the tree to the selected item
Ctrl+Shift+U	Unhoist to display the entire tree

Info Item Operations:

Insert	Insert a new child Info Item (using the Default Child Template of the parent item's template)
Shift+Enter	Insert a new sibling Info Item (using the Default Child Template of the parent item's template)
Alt+Insert	Show Insert Child Menu
Alt+Shift+Insert	Show Insert Sibling Menu
Delete	Delete the selected Info Item's to the Recycle Bin
Shift+Delete	Permanently delete the selected Info Items (and child Info Items if they are not linked)
Ctrl+Shift+Delete	Permanently delete the selected Info Item's (all links) and all child Info Items
F2 or F4	Rename the current Info Item
Ctrl+A	Select all sibling Info Items
Ctrl+Shift+Up Arrow	Move the selected Info Items up
Ctrl+Shift+Down Arrow	Move the selected Info Items down
Ctrl+Shift+Left Arrow	Move the selected Info Items left
Ctrl+Shift+Right Arrow	Move the selected Info Items right
Alt+L	Link, move, or copy the selected items to another location
Ctrl+Shift+L	Link, move, or copy the items from another location to the selected items

Flag Operations:

Ctrl+Shift+M	Display Flag menu
Shift+B	Set the flag of the selected Info Items to *Blue*
Shift+C	Set the flag of the selected Info Items to *Completed*
Shift+G	Set the flag of the selected Info Items to *Green*
Shift+N	Set the flag of the selected Info Items to *None*
Shift+O	Set the flag of the selected Info Items to *Orange*
Shift+P	Set the flag of the selected Info Items to *Purple*
Shift+R	Set the flag of the selected Info Items to *Red*
Shift+Y	Set the flag of the selected Info Items to *Yellow*

Miscellaneous Operations:
Alt+P   Show the Paste Special menu
Ctrl+A   Select all sibling items

Clipboard
Ctrl+Shift+C   Copy With URL: copy selected *Item Titles* + *<Tab>* + associated *URL* to clipboard

See Also:
· Global Keyboard Shortcuts
· Data Explorer Pane
· Search Pane

5.2.2.3   Item Attributes Pane Shortcuts

Insert   Display the Attribute Editor Dialog to either assign an existing Attribute or create a new
               one
Delete   Delete the selected Info Item Attribute
F2   Edit the value of the currently selected Info Item Attribute (if not read-only)
F4   Open the Attribute Properties Dialog for the current Attribute
Ctrl+Left   Decrease the size of the Attributes column
Ctrl+Right   Increase the size of the Attributes column

See Also:
· Global Keyboard Shortcuts
· Item Attributes Pane
· Attribute Properties
· Attribute Properties Dialog

5.2.2.4   Item Details and Notes Panes Shortcuts

Text and Web Related
Ctrl+Q or Enter   Navigate to the selected internal link or open the selected *URL* in the
                             Internal Browser
Ctrl+Shift+Q, Shift+Enter,   Open the focused or selected *URL* in the default browser
or Shift+Click
Ctrl+Click   Open the item or URL in a new tab

Text Related
Ctrl+A   Select All
Ctrl+F   Show the Find in Text Dialog
Ctrl+H   Show the Replace Dialog
F3   Find Next
Ctrl+Shift+ Copy the current web page shortcut (Internal Browser View) to the clipboard
C
Ctrl+Shift+ Paste as text into the Rich Text Editor or Item Notes Pane
P
Ctrl+Shift+ Insert or edit a hyperlink
K

Image Viewer:
Ctrl+A   Show image with actual size
Ctrl+B   Show image size with best fit

See Also:
· Global Keyboard Shortcuts
· Text Formatting

- Item Details Pane
- Internal Browser View
- Image Viewer
- Rich Text Editor
- Text Document Editor

5.2.2.5 Related Items Pane Shortcuts

These are the keyboard shortcuts that apply when the Related Items Pane has the focus:

Info Item Operations:
Enter	Go to the selected Info Item in the Data Explorer or Search Pane
Insert	Insert a new Info Item
Delete	Delete the selected Info Item's to the Recycle Bin
Shift+Delete	Delete the selected Info Items (and child Info Items if they are not linked)
Ctrl+Shift+Delete	Delete the selected Info Item's (all links) and all child Info Items
F2 or F4	Rename the current Info Item
Ctrl+A	Select all Info Items

Flag Operations:
Ctrl+Shift+M	Display Flag menu
Shift+B	Set the flag of the selected Info Items to *Blue*
Shift+C	Set the flag of the selected Info Items to *Completed*
Shift+G	Set the flag of the selected Info Items to *Green*
Shift+N	Set the flag of the selected Info Items to *None*
Shift+O	Set the flag of the selected Info Items to *Orange*
Shift+P	Set the flag of the selected Info Items to *Purple*
Shift+R	Set the flag of the selected Info Items to *Red*
Shift+Y	Set the flag of the selected Info Items to *Yellow*

Clipboard
Ctrl+Shift+C	Copy Grid Values: copy selected grid values to clipboard, values delimited with Tab character

See Also:
- Global Keyboard Shortcuts
- Related Items Pane

5.2.2.6 Text Formatting Shortcuts

Ctrl+F	Show the Find in Item Dialog
Ctrl+H	Show the Replace Text Dialog
F3	Find the next Find/Replace Dialog match
Delete	Delete the selected text or the next character following the cursor
Backspace	Delete the selected text or the next character before the cursor
Ctrl+B	Toggle bold for the selected text
Ctrl+I	Toggle italics for the selected text
Ctrl+U	Toggle underline for the selected text

Ctrl+Shift+B	Toggle bulleting of the selected text
Ctrl+Shift+M	Toggle strikeout of the selected text
Ctrl+Shift+G	Highlight the selected text (with the last highlight color used)
Ctrl+Shift+L	Toggle between bulleting and several numbering options (and none)
Ctrl+=	Toggle subscript for the selected text
Ctrl+Shift+=	Toggle superscript for the selected text
Ctrl+L	Align the selected text to the Left
Ctrl+Shift+T	Align the selected text to the Center
Ctrl+R	Align the selected text to the Right
Ctrl+Shift+O	Show the Font Dialog
Alt+X	Converts the Unicode hexadecimal value preceding the insertion point to the corresponding Unicode character
Insert	Toggle the Insert/Overwrite modes
Ctrl+Up Arrow	Move the cursor to the start of the previous paragraph
Ctrl+Down Arrow	Move the cursor to the beginning of the next paragraph
Ctrl+Left Arrow	Move the cursor to the start of the previous word
Ctrl+Right Arrow	Move the cursor to the start of the next word
Ctrl+Home	Move the cursor to the start of the text
Ctrl+End	Move the cursor to the end of the text
Ctrl+A	Select All
Ctrl+Shift+Up Arrow	Select all text between the cursor location and the start of the line
Ctrl+Shift+Down Arrow	Select all text between the cursor location and the end of the line
Ctrl+Shift+End	Select all text between the cursor location and the end of the text
Ctrl+Shift+Home	Select all the text between the cursor location and the start of the text
F7	Spell check the item text or item notes
Ctrl+F7	Display the Spelling Options dialog
Shift+F7	Display the AutoCorrect Options dialog
Alt+F7	Display the Text Statistics dialog

See Also:
· Global Keyboard Shortcuts
· Rich Text Editor

5.2.3 Favorites Shortcuts

A range of keyboard shortcuts are available for assignment to Favorites. These include:
· *Alt+0* thru *Alt+9*
· *Shift+Alt+A* thru *Shift+Alt+Z*
· *Ctrl+Alt+number* and *Ctrl+Shift+Alt+letter*, or holding down the Ctrl key when clicking on a favorite will open the favorite in a new tab (or launch it externally if the related option is checked).

Note: you can also assign these shortcuts to other functionality using the Customize Dialog, but if you later desire to revert one of these shortcuts as a Favorite shortcut, you will need to *Reset All* keyboard shortcuts.

See Also:
· Customizing shortcuts
· Customize Dialog

5.3 Tool Tip Features

Ultra Recall uses tool tips extensively to display the complete text of an item when the text is truncated due to lack of space and to show the current Info Item when scrolling in a list.

5.4   Drag and Drop

Drag and Drop is a way to *move*, *link* or *copy* information in Windows using the mouse. With **drag and drop**, you simply click and hold the mouse on something, then move the mouse to the desired location, and release the mouse button.

Ultra Recall provides extensive **drag and drop** support, both for arranging and managing information within Ultra Recall (even between Info Databases) and for capturing information from a variety of sources external to Ultra Recall.

See the following **drag and drop** help sections:
* Within Ultra Recall
* From External Sources
* To External Applications

5.4.1   Drag and Drop within Ultra Recall

Drag and Drop can be used for all information management tasks in Ultra Recall. You can drag and drop items within the Data Explorer Pane, the Search Pane, from the Related Items Pane to other panes, in the Item Details of a Text item, and even between Info Databases.

An *internal* drag and drop action can move, link or duplicate existing Info Items in Ultra Recall. Holding *Shift* when dragging in the Data Explorer Pane will allow reordering of sibling Info Items (Info Items under the same parent Info Item).

You can drag and drop with the left or right mouse button, but each works slightly different:
* **Left button drag:** When you drag with the left mouse button, the default drop behaviour is t*o Move* the selected Info Items. You can override this default behaviour (when applicable) by using several keyboard overrides when you drop:
  * *Alt* key: Create a new link to the selected Info Item [Logical Linking]
  * *Ctrl* key: Create a new Info Item identical to the source Info Items at the new location (Copy).
  * *Shift* key: same as default behaviour (*move*)

* **Right button drag:** When you drag with the right mouse button, when you drop a menu with the different choices is presented for your selection.

Drag & Drop between different Ultra Recall Info Databases: Drag and drop between different Ultra Recall Info Databases is fully supported (you can only *move* or *copy* Info Items between different Info Databases).
Note: If the instance of Ultra Recall you wish to drop in is not visible, simply hover the mouse over the task bar icon for that instance of Ultra Recall, and after a slight delay it will be focused, allowing you to complete the drop operation (or use Alt+Tab while dragging to activate the desired instance).

See Also:
* Drag and Drop
* Moving Info Items
* Duplicating Info Items
* Logical Linking
* Internal Linking

5.4.2   Drag and Drop from External Sources

A simple way to capture external content into Ultra Recall is Drag and Drop.

You can drag and drop with the left or right mouse button, but each works slightly different:
* **Left button drag:** When you drag with the left mouse button, the default drop behaviour is

determined by the *Options | Import* setting: *Store contents when importing files or web page addresses.* You can override this default import behaviour (when applicable) by using several keyboard overrides when you drop:
- *Alt* key: Create an Info Item that as is linked to the original source (*link*)
- *Ctrl* key: Create an Info Item that stores the contents of the original source (*copy*)
- *Shift* key: Create an Info Item that stores the contents of the original source, then deletes the original source (*move*)

- **Right button drag:** When you drag with the right mouse button, when you drop a menu with the different choices is presented for your selection.
  Note: Right button drag is not available in certain situations like dragging a URL from the address bar in most browsers, such as Internet Explorer or Netscape.

The above options are not always available, and several options exist depending on the source of the captured information. See the table below to view the details on each data source:

Application	Link	Copy	Move
Internet Browsers	Yes	Yes	No
Email Applications	No	Yes	No
Windows Explorer	Yes	Yes	Yes
Text from any application	No	Yes	No

Note: What happens when text that contain a URL is dropped within Ultra Recall is determined by the user setting: *Tools | Options | Import | Identify and process URL in clipboard text.* The two different options are:
Yes: Ultra Recall will attempt to create an Info Item based on the *URL*
No: Ultra Recall will always simply create an Info Item containing the text

Note: If the instance of Ultra Recall you wish to drop in is not visible, simply hover the mouse over the task bar icon for that instance of Ultra Recall, and after a slight delay it will be focused, allowing you to complete the drop operation.

See Also:
- Drag and Drop
- Capturing Info with Drag and Drop
- Creating Info Items

5.4.2.1 Drag and Drop from Internet Browsers

You can easily drag and drop a web page from any **browser** by dragging the icon to the left of the *URL* in your browser's address bar.

Note: Some browsers do not support right dragging the URL in the address bar, so to perform a non-default drag operation (i.e., copy instead of link) in this case, hold down the **Ctrl** key when dragging.

You can also drag a partial web page into Ultra Recall. Simply highlight the text you wish to import into Ultra Recall, then drag and drop this text where you want to place it into Ultra Recall. Ultra Recall will attempt to include any embedded images and links.

Note: Selecting part or all of the web page before importing may be needed when importing a secure page (for instance, an order receipt page) or a page behind a login so that the already-loaded page gets stored instead of attempting to retrieve the page again online.
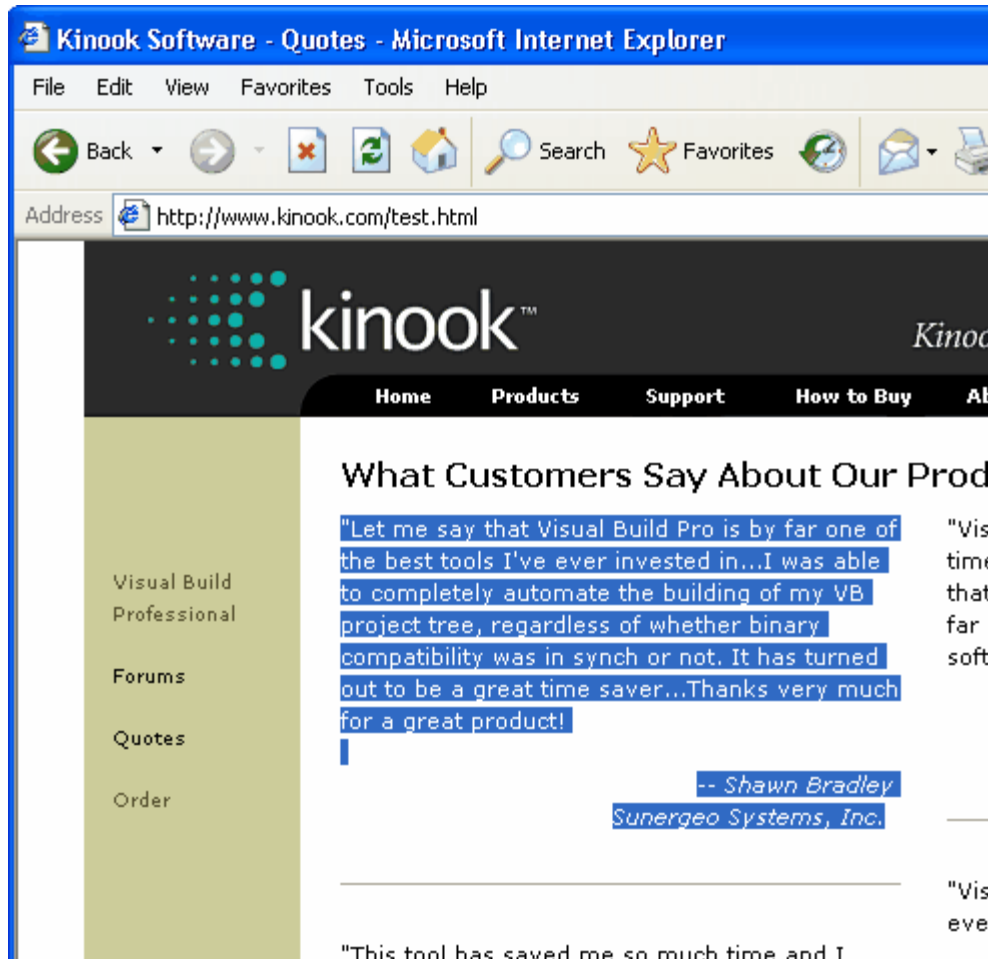
See Also:
- Drag and Drop
- Capturing Info with Drag and Drop
- Internal Browser View
- Creating Info Items

5.4.2.2 Drag and Drop from Email Applications

Ultra Recall is a great place to store emails that you need for future reference. As emails are dropped from your email application into Ultra Recall, a new Info Item is created for each one, and both the email text and all attachments are processed for text and all other Ultra Recall features.

Microsoft Outlook, Outlook Express, Windows Mail, Windows Live Mail, and The Bat! applications are supported, allowing one or multiple emails from any folder to be dropped into Ultra Recall.

If emails are dragged directly from the Outlook Express, Windows Mail, or Windows Live Mail, the only available drop option is *Copy*. When dragging from The Bat!, hold down the Shift key to *move* the message into Ultra Recall (instead of linking to the temporary message file). If the emails are dragged from Microsoft Outlook or Windows Explorer (after saving them to disk), you can *copy, link,* or *move*

them into Ultra Recall.

See Also:
- Drag and Drop
- Drag and Drop from External Sources
- Capturing Info with Drag and Drop
- Mime Viewer
- Microsoft Outlook Integration

Note: Microsoft Outlook integration available in the Professional edition only.

5.4.2.3 Drag and Drop from Windows Explorer

You can drag and drop one or multiple files or folders from Windows Explorer into Ultra Recall. The default drop action is to create a new Info Item for each file that *links* to the original file (does not store the file contents within the Info Database).

You can use keyboard modifiers to specify an alternate drop action.

See Also:
- Drag and Drop
- Capturing Info with Drag and Drop
- Import Wizard

5.4.2.4 Drag and Drop text from any application

Drag and drop can be used to capture text (including rich text or RTF) from any application supporting drag and drop. A new Info Item will be created containing the text that was selected, and any formatting of the text will be preserved.

Selected text can only be *copied* into Ultra Recall, it can't be moved or linked because it is text only, it does not include the source file.

5.4.3 Drag and Drop to Other Applications

Drag and Drop can be used to copy content from Ultra Recall to other applications.

- **From the Data Explorer or Search Pane:** Dragging from these panes will drop the selected *Item Titles* (for applications that support dropping of text), the selected item's URL (for applications that support dropping of URLs), and the selected item's document (for applications that support dropping of files).
- **From the Related Items Pane:** Dragging from this pane will drop the contents of the selected rows, delimited by tabs (for applications that support dropping of text), the selected item's URL (for applications that support dropping of URLs), and the selected item's document (for applications that support dropping of files).
- **From the Item Details or Item Notes Pane:** Dragging from these panes will drop the selected rich text.

See Also:
- Drag and Drop

5.5   Copy and Paste

Copy and Paste is a way to *copy*, *move* and *link* information in Windows using the clipboard. You place information on the clipboard with a *Copy* or *Cut* operation, then place this information somewhere else with a *Paste* operation.

Ultra Recall provides extensive **Copy and Paste** support, both for arranging and managing information within Ultra Recall (even between Info Databases) and for capturing information from a variety of sources external to Ultra Recall.

See the following **Copy and Paste** help sections:
· Within Ultra Recall
· From External Sources

Note: Copy and Cut actions honor the current selection, but Paste and the various Paste Special actions honor the location of the☐ .

focus rectangle keyboard support for **Copy and Paste** actions is supported and they are also available via the Edit Menu.

See Also:
· Capturing Information with Copy and Paste
· Logical Linking
· Moving Info Items
· Drag & Drop

5.5.1   Copy and Paste within Ultra Recall

Copy and Paste can be used for all information management tasks in Ultra Recall. You can copy and paste items within the Data Explorer Pane, the Search Pane, from the Related Items Pane to other panes, in the Item Details of a Text item, and even between Info Databases.

Cut, Copy and Paste can be used to move, link or duplicate existing Info Items in Ultra Recall.

Info Items can be copied (or cut) from several panes within Ultra Recall:
· Data Explorer Pane
· Search Pane
· Related Items Pane
Note: Like most Windows applications, if Info Items are cut, they will be displayed as subdued until they are either pasted (and removed from the source location) or something else is placed on the clipboard.

By default pasting Info Items on the clipboard will result in a new link being made at the current location of the focus rectangle (which is not necessarily the current selection). If the Info Items were placed on the clipboard with a *Cut* action, the source Info Items will be removed (completing a *Move* action).

Several keyboard shortcuts exist for most Copy and Paste actions:
Ctrl+C: copy the current selection to the clipboard
Ctrl+Shift+C: copy the current select (with URL) to the clipboard
Ctrl+X: cut the current selection to the clipboard
Ctrl+V: create a new link to the copied Info Items. See Logical Linking for more details.
Ctrl+Shift+V: create a duplicate of the Info Items on the clipboard (and their child Info Items)
Alt+P: Display the Paste Special menu, giving more alternate paste choices

See Also:
· Copy and Paste
· Moving Info Items
· Logical Linking
· Internal Linking

5.5.2   Copy and Paste from External Sources

Copy and paste can be used to capture content into Ultra Recall from external source. Most things that can be placed on the clipboard can be captured into Ultra Recall by *Pasting* it into Ultra Recall.

Note: Due to limitations of Outlook Express and Windows Mail/Live Mail, multiple emails can't be copied and pasted into Ultra Recall. You can, however, drag and drop multiple emails from Outlook Express, Windows Mail, and Windows Live Mail into Ultra Recall.

If text on the clipboard contains a *URL* to a file or web page, it will be processed as a *URL* if the Import Option | *Identify and process URL in clipboard text* option is checked.

See Also:
- Copy and Paste
- Capturing Info with Copy and Paste
- Logical Linking
- Creating Info Items

5.5.3   Copy and Paste to Other Applications

Copy and Paste can be used to copy content from Ultra Recall to other applications.

- **Edit | Copy** (*Ctrl+C*) will place the selected Item Titles (for applications that support dropping of text), the selected item's URL (for applications that support dropping of URLs), and the selected item's document (for applications that support dropping of files).

- **Edit | Copy Extended** (*Ctrl+Shift+C*) is also available which places additional information on the clipboard depending on the active pane. *Note:* The caption of this menu item changes to better reflect the extended copy action to be performed.
  - **From the Data Explorer or Search Pane:** The Item Title + <tab> + the URL (when available) is placed on the clipboard.
  - **From the Related Items Pane:** The contents of selected rows (or the entire grid if no rows are selected) is placed on the clipboard, delimited by *Tabs*. This can be useful for copying to Excel, for instance.
  - **From Contact Editor:** places the mailing address of the currently displayed contact on the clipboard.
  - **From Item Attributes Pane**: places all attribute names + values from this pane on the clipboard, delimited by *Tabs*.
  - **From Internal Browser View:** places the current page shortcut (*URL*) to the clipboard.

See Also:
- Copy and Paste
- Edit Menu
- Data Explorer Pane
- Search Pane
- Contact Editor
- Item Attributes Pane
- Internal Browser View
- Item Details Pane

5.6   Command-line syntax

Ultra Recall can be launched from the command-line (the Run dialog, a Command Prompt, a Windows shortcut, etc.) with the following options:

```
UltraRecall[.exe] ["c:\path\to\file.urd"] [/readonly] [/item itemid] |
[/url "file/URL"] [/newtab] [/import[dup] "file/URL" ...] | [/importclip] |
[/linkoutlook] | [/copyoutlook] | [/moveoutlook] | [/sync] | [/export "set
name"]
```

file.urd	Open the specified Ultra Recall Info Database. If not provided, the active database will be used (if already started) or the most recently opened (if any) database will be reopened.
/readonly	Open the specified database read-only (database must not already be open in Ultra Recall)
/item	Navigate to the specified Info Item (specified by its ItemID system attribute or comma-separated lineage of self+ancestor item IDs)
/url	Open the specified file or URL in Ultra Recall
/newtab	Opens the specified item or URL in a new tab
/import	Create an Ultra Recall Info Item linked to the file(s) or URL(s)
/importdup	Create an Ultra Recall Info Item, storing the file(s) or URL(s) contents
/importclip	Create an Ultra Recall Info Item from the clipboard contents
/linkoutlook	Create Ultra Recall Info Items linked to the currently selected Outlook object(s) (emails, appointments, etc.)
/copyoutlook	Create stored Ultra Recall Info Items for the currently selected Outlook object(s)
/moveoutlook	Create stored Ultra Recall Info Items for the currently selected Outlook object(s), removing from Outlook
/sync	Synchronize the item
/export	Export the item using the specified export settings

The *Item | Copy Item Command-Line* menu item can be used to generate the command-line for opening the selected Info Item (the format is configured on the Miscellaneous Options tab of the Options Dialog). And the *Item | Create Desktop Shortcut* menu item can be used to create a Windows desktop shortcut to open the selected Info Item.

Ultra Recall also supports a URL syntax for opening a database to a specific item within the database. This URL syntax can be used from the Windows Shell (the Run Dialog, Explorer, etc.) or other applications that support a URL for accessing applications and documents. To create this URL syntax, see the notes in the help topic for the Miscellaneous Options tab of the Options Dialog.

Notes:
- Microsoft Outlook must be running and have a current selection for the Outlook flags to operate correctly
- When a command-line initiated import is finished, a sound is played by Ultra Recall to indicate completion
- Outlook import, sync, and export operations are available in the Professional edition only.

Examples:

To open the specified database and create an item linked to the Ultra Recall home page:
```
UltraRecall.exe "c:\Files\My Stuff.urd" /import "http://www.ultrarecall.com
"
```

To open the Ultra Recall home page:
```
UltraRecall /url "http://www.ultrarecall.com"
```

To import the current clipboard contents:
```
UltraRecall /importclip
```

To import (stored) the current selection in Outlook:
```
UltraRecall /copyoutlook
```

To open the Quick Search item in a new tab:
`UltraRecall /item 990 /newtab`

See Also:
- Importing Data
- Import Dialog
- Import Options
- Outlook Integration
- Miscellaneous Options

6   Definitions

6.1   Child Info Item

The Data Explorer Pane displays the relationships between Info Items.

Here, the *Notes, Tasks, Contacts, Projects, Imported Items, Templates* and *Recycle Bin* Info Items (which are sibling Info Items) are all **Children Info Items** of the *My Data* Info Item.

6.2   Clipboard

When ever something is copied or cut in Windows, the information is placed into special digital storage, called the **clipboard**. Only one thing exists on the clipboard at a time, so when you cut or copy, it replaces what was on the clipboard earlier. Only one thing exists on the clipboard, but it can be stored there in multiple formats (for example, text, html, and rich text).

Ultra Recall provides several mechanisms for importing clipboard data into Ultra Recall.

Note: When the computer is turned off, the clipboard is cleared, and the contents are lost forever.

6.3   Context Menu

A popup menu that appears when you right-click over an object on the screen. This is also sometimes referred to as a "shortcut menu".

6.4   Copy

To **copy** something in Windows means to place it on the clipboard.

Methods to **Copy** the selected information in Ultra Recall:
Keyboard shortcut: Press *Ctrl+C*
Menu Bar: Press *Edit | Copy*

6.5   Cut

To **cut** something in Windows means to place it on the clipboard and marking it for moving when pasted. So if the **cut** information is pasted, it will be removed from the original location after being placed at the new location.

Methods to **Cut** the selected information in Ultra Recall:
Keyboard shortcut: Press *Ctrl+X*
Menu Bar: Press *Edit | Cut*

6.6   Delimited Text File

A **delimited text file** (such as a comma-separated file) is a text file containing a matrix of text information in rows and columns. Each row ends in a *Carriage Return/Line Feed* (which simply means that each row is a separate line of text).
Each *value* in a row of data is separated from the next with a **delimiter** character, such as a comma [,] a TAB, a ~ or some other character.

6.7   Document Summary Information

Any file can contain summary information, which can be viewed/edited with the Windows Explorer file properties dialog, displayed below:
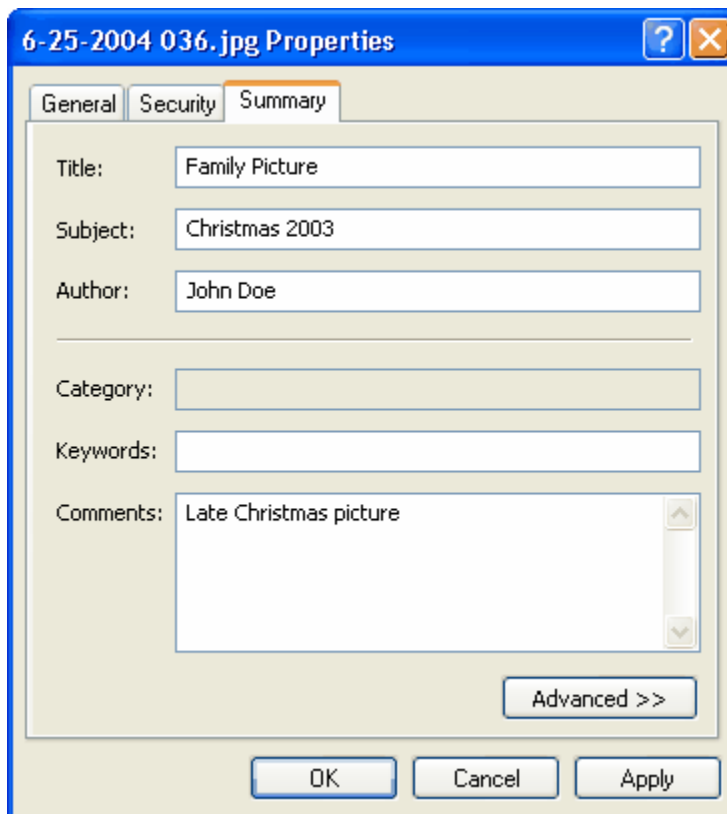
Note: Displayed is the Simple mode of this dialog which shows the summary values that are provided for all file types. An Advanced mode is typically available as well, which provides access to values specific to a specific file type (and where custom values can be defined as well).

Ultra Recall supports capturing of summary information for text and attribute values when importing documents.

Note: Available in Professional edition only.

6.8   Encryption

By assigning a password to an Info Database, Ultra Recall will encrypt the Info Database file (using 256-bit RC4 encryption), making the contents inaccessible without providing the assigned password. The longer the password provided, the more secure your data becomes.

WARNING: **Once an Info Database has been encrypted with a password, you must use this password to gain access to the file, passwords can NOT be recovered from an encrypted .urd file!**

Note: Additional processing is necessary to read and write an encrypted Info Database, which can modestly degrade the performance of Ultra Recall.

See Also:
· Enter Password Dialog

Note: Available in Professional edition only.

6.9   Focus Rectangle

The **Focus Rectangle** is the dotted rectangle outlining the current position in the active Selection Pane.
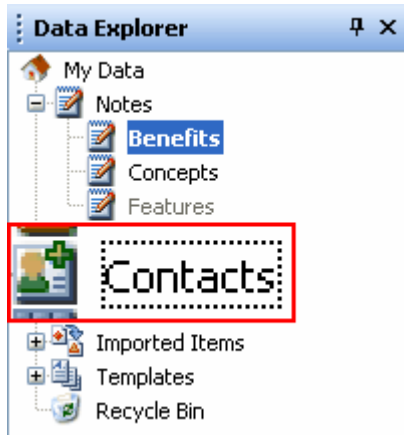
In the image above, the **focus rectangle** is on the *Contacts* Info Item, while the selection is on the *Benefits* Info Item. The dotted rectangle is clearly visible (exploded for easier viewing).

Typically the **Focus Rectangle** matches the selection (the highlighted items). This is always the case when navigating or selecting Info Items with the mouse, except for multiple selection, when only the last selected Info Item is in the **Focus Rectangle**.

When navigating with the keyboard, you can position the **Focus Rectangle** to a different location than the selection, by holding the *Ctrl* key while navigating within a Selection Pane with the arrow keys.

Actions only available for single selection. Any action that only honors single selection will always use what is specified by the Focus Rectangle (regardless of the selection). This includes:
· Paste
· Paste Special
· Import
· Flags
· Open Item
· Open Document

- Insert
- Rename
- Expand/Collapse
- Select All

6.10 Goto Info Item

There are many ways to navigate to an Info Item in a Selection Pane without using the mouse (simply clicking on an Info Item in a Selection Pane). These include:
- Double-clicking or typing *Enter* on an Info Item in the Related Items Pane or Item Parents Pane
- Using one of the *View | Go To* Menu Bar entries to navigate to an Info Item
- Using Go Back or Go Forward navigation features
- Going to a Favorite
- Using the Jump dialog

6.11 OML (XML)

OML or Outline Markup Language is an XML dialect (similar to OPML or Outline Processor Markup Language).

See http://oml.sourceforge.net and www.opml.org for details.

See Also:
Exporting to XML

6.12 Parent Info Item

The Data Explorer Pane displays the relationships between Info Items.

Here, the *My Root* Info Item is the **parent** of the *Notes, Tasks, Contacts, Projects, Imported Items, Templates* and *Recycle Bin* Info Items (which are sibling Info Items).
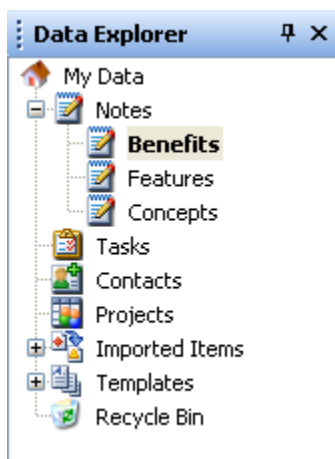
6.13 Paste

To **paste** something in Windows means to put whatever is currently on the clipboard to the current carrot location.

Methods to **Paste** the selected information in Ultra Recall:
Keyboard shortcut: Press *Ctrl+V*
Menu Bar: Press *Edit | Paste [or Paste Special which provides additional Paste Options]*

6.14   Rich Text

Rich Text is text that can contain formatting, such as **bold**, *italics*, different fonts and sizes, colors, bullets, numbering, line spacing, indentation, etc.

6.15   Selection

The Ultra Recall application consists of several different Panes, some of which are Selection Panes, and others that are Dependent Panes. Users choose one or more Info Items in a Selection Pane (or a *URL* in the case of the Web Toolbar), and the Dependent Panes display additional detail about the selected Info Items.

Selected Info Items are highlighted. When the highlighting is prominent, the Pane with the **selection** is active. When the highlighting is subdued, a different Pane is active. The highlighting color is dependent on the current Windows desktop configuration.

Many actions in Ultra Recall honor multiple selection, which will always be what is highlighted. Some of these actions include:
· Move
· Sort
· Cut
· Copy
· Delete
· Export
· Keywords

Actions that only honor single **selection** instead rely on the focus rectangle for **selection**.

See Also:
· Multiple Selection
· Panes

6.16   Sibling Info Item

If an Info Item has more than one child Info Item, each child is considered a **Sibling Info Item**.

Each child Info Item of the same Info Item are considered sibling Info Items.

See Parent Info Item, Child Info Item for more details.

7   Purchase & Support

7.1   Order Info

All orders are subject to the License Agreement. The registered version never expires, and licensed users can receive technical support and minor upgrades and bug fixes.

Email delivery of Ultra Recall licenses is available for credit card orders placed via the Internet from the Kinook Software web site. If you prefer, Ultra Recall can also be ordered by telephone, mail, or by corporate purchase order. Please visit the web page for pricing and ordering details.

Customer information is considered confidential and will not be shared or distributed to any third party.

7.2   How To Register

The Registration dialog is accessed by selecting the *Register* item on the Help menu.

If you paid the Ultra Recall licensing fee and received product registration information from Kinook Software, Inc. or an authorized reseller, copy and paste or drag and drop the registration information as indicated in the instructions you received. If entered correctly, the registration info will be updated in the About box and any evaluation limitations will be removed. Please save this information for possible use with future upgrades or in case you need to re-install Ultra Recall.

If you downloaded an evaluation version, or if you received this version on a disk or CD included with a book or with other hardware or software and you have not paid the licensing fee, you are licensed to use Ultra Recall for evaluation purposes only for a period of 60 days.

For information on purchasing a license to use Ultra Recall for non-evaluation purposes, see the Order Information section.

7.3   Technical Support

To verify that you have the most recent version of Ultra Recall, select Help | Check for Updates on the menu or visit the Kinook Software web site.

When reporting any problems encountered, please ZIP and send **all** of the following information to support@kinook.com:

1) The info from Help | About | Install Info on the menu, and if the problem involves importing from or interacting with another application (i.e., Internet Explorer, Outlook, etc.), the version and service pack of that application.

2) Run RegEdit and export the registry key "HKEY_CURRENT_USER\Software\Kinook Software\Ultra Recall\Options". Type Win+R (to show the Run dialog), type regedit and press Enter (to start RegEdit), navigate to the above location, and use File | Export on the menu to save it as a .reg file.

3) A clear description of the problem encountered and screen shots of any error messages. To create a screen shot, press Alt+PrtScn with the error window focused, then Win+R (to show the Run dialog), mspaint and Enter (to start Paint), Ctrl+V to paste the image, and then save the file (preferably in PNG format).

4) Detailed steps to reproduce the problem, from the point that Ultra Recall is started.

5a) A .urd file (ideally starting with one of the sample databases) and any other files needed for #4.

or

5b) If you are unable to provide a database and/or actually visually demonstrating the steps is needed to describe it adequately, send a screen recording of UR showing all steps to reproduce the problem. Free screen recording software is available at http://camstudio.org/.

If the ZIP file to send is larger than 1MB, send it via a free service such as http://www.mailbigfile.com

or http://www.sendthisfile.com.

We will need all of the above information in order to investigate the problem. All information provided will be kept strictly confidential to Kinook technical support.

Note: You can press F1 at any time while Ultra Recall is active for context sensitive help.

You can also visit the Kinook Software Forums for answers to common questions and to post questions to the UR user community.

7.4   Revision History

Visit the Kinook Software web site for details on product history.

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